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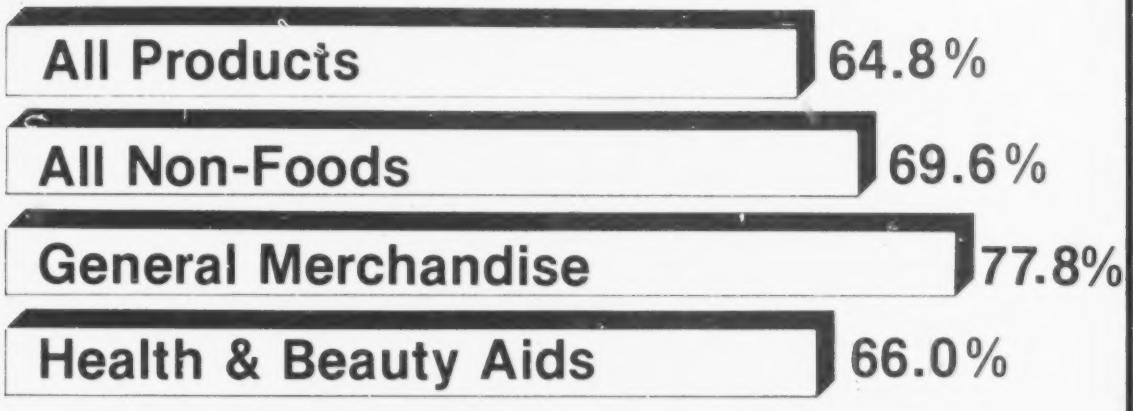
Special Report

POPAI/DuPont Consumer Buying Habits Study

In-Store Buying Decisions



Source: POPAI/DuPont Supermarket Study

Reprinted from Non-Foods Merchandising Magazine

POPAI/DuPont Consumer Buying Habits Study Finds Non-Foods Buys Largely Unplanned

Buying Study Pinpoints Non-Food Choices

NEW YORK—Nearly 70 percent of all non-foods purchases in supermarkets—including both general merchandise and health and beauty aids—are in-store decisions, according to results of the 1977 POPAI/DuPont Study of Consumer Shopping Habits in Supermarkets. (POPAI is the Point-of-Purchase Advertising Institute.)

Although significantly higher in terms of in-store decisions than the 64.8 percent figure for all products (foods and non-foods combined), the 1977 rate of non-foods buying decisions made in the store dropped five percentage points from 74.66 percent in 1965, the last previous year in which this study was made.

The Study Also Reveals:

- General merchandise purchases in supermarkets were in-store decisions in 77.8 percent of the cases, far above the 64.8 percent level of all-product purchases, and substantially above the 69.66 percent rate shown for total non-foods.
- Health and beauty aids were shown to have a higher rate of planning than GM does, with 66 percent of these product purchases made as in-store decisions, substantially the same as for all products bought in supermarkets.
- Seven out of eight non-foods categories were shown to be significantly higher in in-store decisions than the overall study average. Of the eight categories which were tracked, only "Oral Hygiene, Remedies and Vitamins" fell below the average of all products, coming in with a 57.3 percent figure as in-store decision buying.

PRODUCT PURCHASED	SPECIFICALLY PLANNED %		GENERALLY PLANNED %		SUBSTITUTE %		UNPLANNED %		TOTAL STORE DECISION %
		+		+		=			
Baby Care Products	27.9		4.7		2.3		65.1		72.1
Air Fresheners, Cleaning Supplies	30.5		7.3		3.1		59.1		69.5
Napkins, Tablecloths, Plates and Cups	24.9		20.2		0.8		54.1		75.1
Pet Supplies	31.2		20.1		1.0		47.6		68.7
Oral Hygiene, Remedies and Vitamins	42.7		3.9		2.1		51.3		57.3
Other Health and Beauty Aids	27.9		8.6		2.3		61.2		72.1
Housewares, Hardware	18.5		13.6		0.3		67.6		81.5
Other Non-Foods	14.9		7.8		0.4		76.9		85.1
All Products (Food & Non-Food)	35.2		14.8		3.0		47.0		64.8

How Study Was Made

The 1977 POPAI/DuPont study, a landmark survey determining how consumers make their buying decisions in food stores, was based on 8,000 face-to-face interviews conducted in over 200 supermarkets throughout the country.

Each interview occurred before and after the shopper shopped. The shopper did not know, was not told, a post-shopping interview would be made. This prevented the shopper from "making her shopping pattern coincide with her plan," according to the sponsoring organizations.

As shoppers entered the store, they were asked what they intended to buy and, for each item, what brand and product they had in mind. The post-shopping interview was a check on whether the shopper bought specifically what she had planned to buy or whether she substituted and/or added to the list.

Buying Decisions Defined

The study determined buying decisions by placing purchases in four categories (defined below) and comparing 1977 with 1965. Here are the results for non-foods purchases:

Specifically Planned (those items where the consumer had in mind a brand or item and purchased that item or brand as planned) increased from 25.34 percent in 1965 to 30.34 percent in 1977.

Generally Planned (where the shopper had in mind a product category or a product without a brand in mind) dropped from 14.48 percent in 1965 to 12.8 percent in 1977.

Substitute Purchases (where the shopper changed from a "specifically planned" item to another—like a switch in brand or a change in product category) remained about the same for both study years—1.4 percent in 1965 compared with 1.98 percent for 1977.

Unplanned Purchases (items the shopper did not have in mind upon entering the store) dropped from 58.79 percent in 1965 to 54.89 percent in 1977.

Store Decisions—the all-important buying classification figure arrived at by combining **Generally Planned, Substitute** and **Unplanned** purchases—showed the results mentioned earlier in this report... that non-foods in-store purchasing decisions declined somewhat from 74.66 percent in 1965 to 69.66 percent in 1977.

P-O-P Displays Spur Sales

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Which Categories Starred

Aside from foods, the POPAI/DuPont study tracked eight major non-foods categories and designated them under these headings:

—Baby Care Products.

—Air Fresheners, Other Cleaning Supplies, Waxes.

—Napkins, Tablecloths, Plates and Cups (including party goods).

—Pet Supplies.

—Oral Hygiene, Remedies and Vitamins.

—Other Health and Beauty Aids.

—Housewares and Hardware.

—Other Non-Foods.

Of these broad categories, "Other Non-Foods" was far and away the standout in terms of in-store shopping decisions. Bearing in mind that the average figure for all products (food and non-food) was 64.8 percent, here's how the sub categories of "Other Non-Foods" rated in store decisions:

- **Automative Supplies** racked up a whopping 94.4 percent—the highest percentage for any category in the entire study. In fact, only 5.6 percent of automotive supplies purchases were found to be specifically planned.
- **Books, Magazines and Newspapers** also scored exceptionally high in store decision buying with 91.7 percent. Here, 8.3 percent was specifically planned, and only 1.9 percent was generally planned.
- **Toys and Games** (including items like balloons, party hats, etc.) scored 86.8 percent in store decisions, followed by **Wearing Apparel and Sewing Needs** with 80.4 percent; **Stationery and School Supplies** with 80.2 percent; **Photographic Supplies** with 80 percent, and **Garden Supplies** with 79.5 percent.
- **Charcoal, Logs and Barbecue Supplies**, with 66 percent, came closest of any in this category to the all-products average.

Housewares, Hardware Ranks

Another highly-ranked major category in terms of in-store purchasing decisions was "Housewares and Hardware," with 81.5 percent for the entire category.

Here are how its sub categories fared:

PRODUCT PURCHASED	SPECIFICALLY PLANNED %	+ GENERALLY PLANNED %	+ SUBSTITUTE %	= UNPLANNED %	TOTAL STORE DECISION %
Oral Hygiene, Remedies and Vitamins	42.7	3.9	2.1	51.3	57.3
Remedies and Vitamins, Total	40.8	3.5	2.1	53.5	56.3
Cold Remedies, Total	42.2	4.4	4.4	48.9	57.8
Laxatives	35.7	7.1	0.0	57.1	64.1
Vitamins	50.0	12.5	0.0	37.5	50.0
Other Remedies	57.1	0.0	0.0	42.9	42.9

PRODUCT PURCHASED	SPECIFICALLY PLANNED %	+ GENERALLY PLANNED %	+ SUBSTITUTE %	= UNPLANNED %	TOTAL STORE DECISION %
Health and Beauty Aids	27.9	8.6	2.3	61.1	72.1
Deodorants, Total	40.0	7.7	3.1	49.2	60.0
Feminine Hygiene Products, Total	35.6	4.1	1.4	58.9	64.4
First Aid Products, Total	25.6	12.8	0.0	61.5	74.3
Hair Care Products for Women, Total	18.1	11.0	3.1	67.7	71.9
Men's Products, Total	34.0	6.0	2.0	58.0	66.0
Skin Care, Other Health and Beauty Aids	31.5	7.4	3.7	57.4	68.5

PRODUCT PURCHASED	SPECIFICALLY PLANNED %	+ GENERALLY PLANNED %	+ SUBSTITUTE %	= UNPLANNED %	TOTAL STORE DECISION %
Other Non-Foods Total	14.9	7.8	0.4	76.9	85.1
Automotive Supplies	5.6	22.2	0.0	72.2	94.4
Books, Magazines, Newspapers	8.3	1.9	0.0	89.8	91.7
Charcoal, Logs, Barbecue Supplies	33.3	25.0	8.3	33.3	66.0
Garden Supplies, Total	20.6	7.4	0.0	72.1	79.5
Stationery and School Supplies	19.9	16.3	0.6	63.3	80.2
Toys and Games, Party Favors	13.2	9.4	0.0	77.4	86.8
Wearing Apparel and Sewing Needs	19.5	4.2	0.8	75.4	80.4
Photographic Supplies, Total	20.0	0.0	0.0	80.0	80.0

Study Interviews Shoppers Before, After S

• **Batteries and Flashlights** scored with 93 percent store decision purchasing.

• **Kitchen Housewares** and **Light Bulbs** both ranked with 84.9 percent in store decisions, followed by **Candles** with 79.1 percent, **Brooms, Mops and Other Cleaning Supplies** (including brushes) with 78.8 percent, and **Other Housewares and Hardware** with 77.4 percent.

• **Cookware and Bakeware** was recorded as having only 60.1 percent in store decision buying, below the all-products average, indicating that more planning goes on in this category.

In other major categories, **Baby Care Products** with 72.1 percent and **Pet Supplies** with 68.7 percent ranked well above the all-products store decision average.

The overall category of "Napkins, Tablecloths, Plates and Cups" had a combined in-store decision ranking 75.1 percent, with two sub categories showing up especially high—**Plastic Tableware** with 85.7 percent, and **Tablecloths** with 83.4 percent. **Plates** scored 80.4 percent; **Napkins** with 75.6 percent, and **Cups** followed with 67.1 percent in-store decision purchases.

The remaining general merchandise category of "Air Fresheners, Other Cleaning Supplies and Waxes" had a combined store decision ranking of 85.3 percent. Scoring high among these were the sub categories of **Sponges and Cloths** with 88 percent, and **Air Fresheners** with 85.3 percent. **Rug Shampoos** led this category with 92.3 percent.

PRODUCT PURCHASED	SPECIFICALLY PLANNED %	+	GENERALLY PLANNED %	+	SUBSTITUTE %	=	UNPLANNED %	TOTAL STORE DECISION %
Batteries, Flash Lights	6.7		33.3		0.0		60.0	93.0
Candles	20.8		20.8		0.0		58.3	79.1
Brooms, Mops, Other Cleaning Supplies	21.2		9.1		0.0		69.7	78.8
Cookware, Bakeware	40.0		6.7		6.7		46.7	60.1
Kitchen Housewares	15.2		6.1		0.0		78.8	84.9
Light Bulbs, Total	15.1		20.5		0.0		64.4	84.9
Other Housewares and Hardware	22.6		11.3		0.0		66.1	77.4
Pet Supplies	31.2		20.1		1.0		47.6	68.7
Baby Care Products	27.9		4.7		2.3		65.1	72.1

PRODUCT PURCHASED	SPECIFICALLY PLANNED %	+	GENERALLY PLANNED %	+	SUBSTITUTE %	=	UNPLANNED %	TOTAL STORE DECISION %
Napkins, Tablecloths, Plates and Cups	24.9		20.2		0.8		54.1	75.1
Napkins, Total	24.3		22.6		1.3		51.7	75.6
Tablecloths	16.7		16.7		0.0		66.7	83.4
Plates, Total	19.6		21.6		0.0		58.8	80.4
Cups, Total	32.8		11.9		0.0		55.2	67.1
Plastic Tableware	14.3		14.3		0.0		71.4	85.7

HBA Decisions are Varied

Although the POPAI/DuPont study revealed an overall figure of 66 percent store decision purchasing for Health and Beauty Aids, it tracked and recorded HBA buying habits in two major categories. One is labeled "Oral Hygiene, Remedies and Vitamins" and, as a grouping, show a combined store decision purchase ranking of 57.3 percent. This figure is not only the lowest of any non-foods category in the study, but also falls below the store decision average of 64.8 percent for all products in the study.

Obvious indications here are that more planning than usual goes on in this category, with the consumer having in mind and purchasing a particular brand or item. In fact, 42.7 percent of the purchases were specifically planned.

By subcategory, here are how product lines shaped up in terms of specifically planned and in-store decisions:

☐ **Remedies and Vitamins:** specifically planned, 40.8 percent; store decisions, 56.3 percent.

☐ **Cold Remedies:** specifically planned, 42.2 percent; store decisions, 57.8 percent.

☐ **Laxatives:** specifically planned, 35.7 percent; store decisions, 64.1 percent.

☐ **Vitamins:** specifically planned, 50 percent; store decisions, 50 percent.

☐ **Other Remedies:** specifically planned, 57.1 percent; store decisions, 42.9 percent.

The other HBA category was labelled in the POPAI/DuPont simply as "Other Health and Beauty Aids," with an overall in-store buying decision ranking of 72.1 percent.

Only two subcategories here fell below the all-products store decision average of 64.8 percent. **Deodorants**, with 40 percent specifically planned and 60 percent in store decisions, and **Feminine Hygiene Products**, with 35.6 per-

dy: GM Tops All for In-Store Decision Rate

cent specifically planned and 64.4 percent store decisions, indicated more than the usual planning by the consumer in brand or item.

First Aid Products scored 74.3 percent in store decisions, followed by **Hair Care Products for Women** with 71.9 percent, **Skin Care and Other Health and Beauty Aids** with 68.5 percent, and **Men's Products** with 66 percent in store decision purchases.

Displays Boost Sales Most

With the results of the 1977 POPAI-DuPont Study, supermarket retailers now have the facts to put their advertising and promotion dollars where they'll help most. The fresh data from this joint research shows how advertising, display, couponing and direct mail can be used—alone or in combination—to spur non-foods sales in specific categories.

Although many of the POPAI-DuPont study's results defy generalization, some findings can be almost universally applied. In all areas of non-foods, in-store display emerges as the single most effective means of increasing sales. Still more effective, though, is the use of advertising in combination with display. Sometimes these, in tandem, can increase the frequency of purchase to as much as six times the average for the same goods, unpromoted.

In all areas of non-foods, in-store display emerges as the single most effective means of increasing sales.

For nearly all categories in the showing of products promoted—by newspaper ads, coupons or store circulars—coupons prove themselves to be the clearest leader in stimulating sales. But store circulars, and newspaper advertisements without coupons, are often almost as strong a factor in boosting a product's incidence of purchase.

The research, whose scope covers both food and non-food areas, nonetheless reveals considerable information about most categories of non-foods. NFM's report sums up the study's findings on:

- the effectiveness of ads, display couponing and direct mail on the incidence of purchase for different non-foods categories
- women shoppers' buying habits in relation to their employment status
- shoppers' buying habits in relation to their age

In addition to the material in the charts shown here, the survey collected information on the composition of the shopping group, the frequency with which a shopper came to the store, her household income level, and whether she brought a list, checked the ads or redeemed coupons.

Working Women Lead in HBA

Equally revealing, as an indicator of the changing shoppers' profile of the late seventies, are the portions of the study which show the buying patterns of women who work outside the home. About half the non-foods categories—particularly *HBA, books, magazines and cleaning supplies*—are bought more often in the supermarket by working women. Full-time housewives, not

Shoppers' Age Reveals Buying Preferences

PRODUCT	PURCHASES PER 100 SHOPPERS						
	ALL SHOPPERS	UNDER 20	20-29	30-39	40-49	50-59	60+
Oral Hygiene Remedies and Vitamins	8.62	12.35	7.96	8.77	8.83	9.02	7.82
Stationery and School Supplies	4.27	6.17	2.85	5.97	4.63	3.74	3.73
Feminine Hygiene Products	1.88	3.70	2.70	2.56	2.03	1.11	.72
Deodorants	1.67	2.47	1.80	2.07	2.03	1.80	.48
Baby Care Products	1.11	2.47	2.70	1.58	.43	.69	.24
Books, Magazines, Newspapers	6.82	4.94	7.66	7.43	7.53	7.49	4.81
Hair Care Products for Women	3.27	3.70	5.11	3.53	3.91	3.05	.96
Toys and Games	1.36	—	2.40	1.83	1.16	1.25	.60
Air Fresheners, other Cleaning Supplies	12.41	11.11	13.81	16.57	12.01	12.07	8.18
Napkins, Tablecloths, Plates, Cups	9.29	4.94	9.16	11.57	9.84	8.18	8.06
Wearing Apparel and Sewing Needs	3.04	3.70	3.00	4.87	4.05	2.64	.72
Skin Care, Other HBA	1.39	1.23	1.50	2.07	1.16	.69	1.32
Housewares and Hardware	7.39	8.64	7.21	7.92	9.12	6.24	6.74
Garden Supplies	1.75	—	1.65	1.46	1.59	2.77	1.20

Young Buy Non-Foods Most at Supermarkets

surprisingly, buy more *baby care products, housewares, toys, napkins, plates and cups.*

While suppositions which go too far from the data can be risky, it is clear that repeat purchase items—HBA, cleaning supplies, books and magazines—are bought most often at the supermarket by women employed outside the home; and they do so probably because they prefer to save time by "one-stop" shopping.

On the other hand, the non-foods goods most often found in full-time housewives' baskets are those commonly needed by women with small children: disposable napkins, plates, cups and toys, to name a few.

Those Younger Buy More

In regards to the age of the shopper, the customers' buying habits identify themselves quite clearly: out of the 14 significant non-foods categories included in the research, nine are predominantly bought by people under 30.

One area, with nearly the highest IP for any category, is *oral hygiene, remedies and vitamins*, bought most often by shoppers under 20.

Those aged 20 to 29, though, buy the most *books, magazines and newspapers*, and the 30-to-39 group leads in purchases of *air fresheners and other cleaning supplies.*

By a small margin, shoppers from 40 to 49 buy the most *housewares and hardwares*, while only in *garden supplies* do those over 50 hold the edge in purchase frequency.

The message here for retailers is that the supermarkets' non-foods shopper is a young—in some cases, *very* young—customer. For this reason, a fresh, young-thinking approach to displays and advertising will likely lure the most shoppers to buy. And, when in doubt about product mix, those products whose marketing and packaging takes the "young" approach probably deserve the largest space in the supermarkets' non-foods departments.

Moreover, supermarket retailers shouldn't miss this opportunity to build their future market: by selling their "one-stop" store image to young people now, they can keep them loyal to the idea in years ahead.☆

Job Status of Women Shoppers

PRODUCT	PURCHASES PER 100 SHOPPERS		
	ALL FEMALE SHOPPERS	EMPLOYED	NOT EMPLOYED
Health and Beauty Aids	12.80	15.61	11.46
Air Fresheners, Other Cleaning Supplies	13.39	15.43	12.42
Oral Hygiene, Remedies and Vitamins	8.75	9.64	8.33
Books, Magazines and Newspapers	7.18	7.44	7.06
Wearing Apparel and Sewing Needs	3.37	3.95	3.10
Plants, Flowers	1.48	1.29	.96
Napkins, Tablecloths, Plates and Cups	9.99	8.17	10.85
Housewares and Hardware	7.72	7.07	8.02
Toys and Games	1.48	1.29	1.57
Baby Care Products	1.24	1.19	1.26

How Store Ads, Coupons Help Purchase Rate

PRODUCT	PURCHASES PER 100 SHOPPERS				
	BRAND AVERAGE PURCHASE*	STORE NEWSP. AD ONLY	STORE NEWSP. COUP. ONLY	STORE CIRCULAR ONLY	NO ADV. IN PAPER OR STORE CIRC.
Batteries, Flashlights	.39	1.05	5.26	5.26	.29
Hair Care for Women	.54	1.22	4.21	.95	.47
Dentrifices	.38	.61	4.17	.73	.35
Oral Hygiene Products	.33	.60	2.89	.76	.30
Men's HBA Products	.32	.25	2.63	.29	.32
Skin Care, other HBA	.46	.36	2.63	.74	.45
Housewares and Hardware	.57	.61	2.11	1.49	.55
Baby Care Products	.37	.41	1.75	.25	.36
Deodorants	.28	.61	1.05	.51	.25
Light Bulbs	.47	1.32	—	5.26	.46
Feminine Hygiene Products	.63	1.91	1.05	3.01	.55
First Aid Products	.50	—	—	2.29	—

**"Brand Average Purchase" denotes figure realized by averaging IP's of individual brands. Averages for the entire category of a product are higher."*

How Ads, Display Affect Incidence of Purchase

PRODUCT	PURCHASES PER 100 SHOPPERS				
	BRAND AVERAGE PURCHASE*	NO AD NO DISPLAY	DISPLAY ONLY	AD ONLY	AD AND DISPLAY
Books, Magazines, Newspapers	6.82	5.70	6.90	11.72	12.22
Other Housewares and Hardware	1.60	1.61	1.45	1.32	4.35
Dentifrices	.38	.32	1.24	.58	3.47
Feminine Hygiene Products	.63	.53	1.58	1.19	3.23
Plates, Cups, Plastic Tableware	.40	.39	.55	.76	2.63
Light Bulbs	.47	.33	1.27	.52	2.56
Coffee Makers, Filters	.39	.30	.49	.77	1.75
Automotive Supplies	.46	.35	.60	.34	1.73
Oral Hygiene Products	.33	.29	.54	.54	1.43
Cookware, Bakeware	.36	.31	.30	.26	1.35
Skin Care, Other HBA	.46	.46	.50	.45	.50
Laxatives	.36	.29	5.56	2.56	—
Wearing Apparel and Sewing Needs	3.04	1.69	3.22	—	2.99
Dishes, Silverware, Glassware	.41	.20	.89	.39	.78
Hair Care Products for Women	.54	.41	.82	1.41	1.34

**"Brand Average Purchase" denotes figure realized by averaging IP's of individual brands. Averages for the entire category of a product are higher.*

The key to making use of the study's results, according to DuPont's Fred Clarke, is to understand the study's principal guideline: the incidence of purchase. Clarke, manager of marketing research and management services for DuPont's Plastic Products and Resins Department, developed the incidence of purchase concept himself. He calls it, alternately, a "popularity index" to a given product.

The figure is reached by calculating the average number of shoppers who pass through the store before a given item is bought, which is then figured as "purchase per hundred." (i.e., if 12 shoppers out of 100 buy item Y, its IP is 12.0. But if 200 shoppers must pass through the store before one purchase of item Z is made, its IP is only .50 purchases per 100.)

Thus, when the use of advertising, display, etc. effects a rise in the IP, it is a direct indication of how sales may increase through promotion. However, researchers warn that the figures for IP must not be related directly to *volume* of sales. (The figure records the purchase, not the quantity of an item: if a shopper bought three tubes of toothpaste at once, it would be recorded as *one* sale.)

THE POPAI • DuPont Study of CONSUMER BUYING HABITS

STORE DECISIONS...2/3 OF EVERY DOLLAR SPENT IN THE MARKETPLACE

The POPAI/DuPont Consumer Buying Habits Study is the successor to the previously conducted DuPont Studies - which were published in five-year intervals from 1935 to 1965. Although there have been shifts in consumer purchasing patterns since the last study, the bottom line remains virtually unchanged - that is - nearly 2/3's of every dollar spent in the supermarket today results from some decision made in the store. In other words, customers are still largely influenced by what they see in the store - and how they view what they see.

The intent of the Study was to determine what percentage of total purchases was planned before the shopper entered the store, and what percentage was influenced by something that happened after entering the store. 53,000 purchases made by 4,000 shoppers at 200 supermarkets were recorded.

The Study was financed by The Point-of-Purchase Advertising Institute and some 50 companies, leaders in marketing their products through the supermarket. These sponsors are receiving general information (such as found in this report) and special proprietary information about their brands and competing brands - data which will never be published. Additionally, sponsors can order special in-depth reports, such as: correlations of various product groups (eg: snack food vs. beverage purchases); interbrand relationships; total purchases for their customers vs. non-customers; purchases by supermarket size for product lines; and nearly 100 other specially prepared reports.

Sponsors are using these findings in a myriad of ways to improve their position in the marketplace. For example, data can be used for:

- sales presentations
- tracing patterns related to demographics
- market planning/strategies
- generating greater merchandising opportunities
- strengthening retail relationships
- departmentalization
- store layout/design
- sales training programs
- enhancing shelf position
- guidelines for tailoring in-store promotions and advertising

IT'S NOT TOO LATE TO PUT THE RESULTS OF THE POPAI/DUPONT CONSUMER BUYING HABITS STUDY TO WORK FOR YOU...

If you are interested in benefiting from this landmark Study, write POPAI
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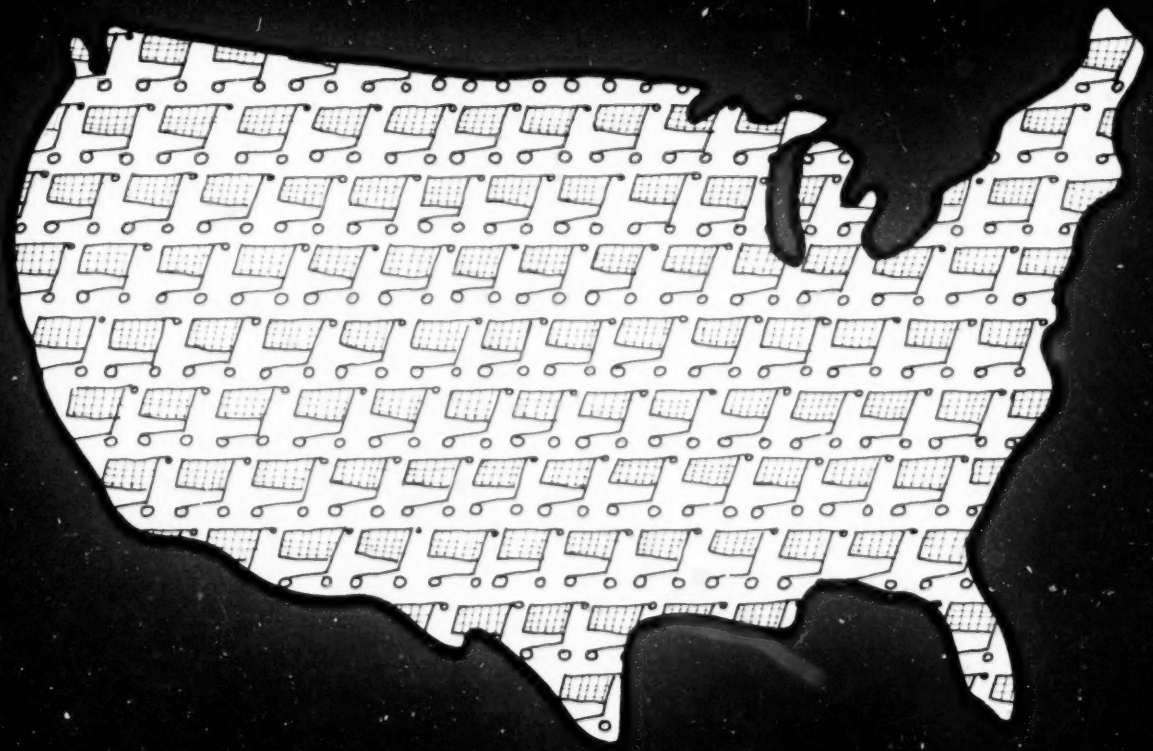
Special Report



CONSUMER BUYING HABITS STUDY

THE TOP 100 BEST BETS

	Product	Purchases per 100 shoppers
1.	Fresh vegetables	99.31
2.	Fresh or frozen meat	72.61
3.	Fresh milk and eggs	69.37
4.	Fresh fruit	61.03
5.	Beef	55.24
6.	Fresh milk	42.11
7.	White bread	37.99
8.	Cheese, cheese foods, spreads	37.14
9.	Other fresh vegetables	34.31
10.	Bottled or canned soda	33.59
11.	Beef other than ground beef	32.12
12.	Butter, margarine	29.19
13.	Non-diet soda	27.28
14.	Eggs	27.26
15.	White bread, non-private label	26.80
16.	Canned soups and mixes	26.69
17.	Cold cereal	26.25
18.	Pet foods and supplies	24.99
19.	Baking needs	23.58
20.	Snacks and gourmet foods	23.47
21.	Fresh ham and lunch meat	23.37
22.	Ground beef	23.11
23.	Snacks	22.78
24.	Frozen fruit and vegetables	22.75
25.	Canned soup	22.52
26.	Fresh or frozen poultry	22.50
27.	Frozen dinners, entrees, other frozen foods	22.37
28.	Margarine	22.03
29.	Frozen vegetables	22.01
30.	Milk, private label	21.16
31.	Milk, non-private label	20.95
32.	Canned and bottled fruits	20.03
33.	Lunch meats	19.92
34.	Chicken	19.85
35.	Bananas	19.23
36.	Toilet tissue	19.20
37.	Canned beans, tomatoes, paste, puree, sauce	18.94
38.	Nonfoods except housewares and hardware	18.87
39.	Lettuce	18.82
40.	Candy and gum	17.99
41.	Sugar and sugar substitutes	17.92
42.	Lunch meats, non-private label	17.19
43.	Pastas, rice, other grains, legumes	17.01
44.	Fresh fruit except apples, oranges and bananas	16.96
45.	Fresh rolls, buns, muffins, not sweet	16.73
46.	Instant and regular coffee	16.60
47.	Dried fruits and nuts	16.40
48.	Cookies	16.27
49.	Canned meat, poultry and fish products	15.98
50.	Jams, jellies, peanut butter, syrups	15.70

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Product	Purchases per 100 shoppers
51. Canned fruit juices and drinks	15.52
52. Crackers	15.44
53. Laundry detergents and soaps	15.21
54. Variety bread	14.98
55. Candy	14.93
56. Pork and pork mixtures	14.80
57. Dog food	14.49
58. Apples	14.44
59. Baking mixes	14.13
60. Frozen fruit juice concentrates	14.13
61. Milk, private label	14.11
62. Bacon	13.64
63. Colas	13.26
64. Mayonnaise and salad dressings	13.26
65. Milk, other brands	13.15
66. Tobacco products and accessories	12.95
67. Buttermilk, cream, cream subs., yogurt, sour cream	12.84
68. Catsup, chili, steak & other sauces	12.77
69. Potatoes	12.74
70. Cheese	12.56
71. Mustard, relishes, olives, pickles, vinegar	12.43
72. Air fresheners, cleaning supplies	12.41
73. Health and beauty aids	12.25
74. Tea and chocolate beverages, beverage mixes	12.18
75. Rolls and buns	11.99
76. Dishwashing products, cleansers, oven cleaners	11.97
77. Paper towels	11.74
78. Ice cream, ice milk	11.74
79. Cakes and pies, fresh	11.69
80. Granulated sugar	11.53
81. Bags, wraps, disposable aluminum pans	11.53
82. Canned fish products	11.17
83. Cigarettes	10.97
84. Canned and bottled fruit juices	10.79
85. Potato chips	10.68
86. Chicken, parts	10.68
87. Bleaches, fabric softeners, etc.	10.60
88. Tomatoes	10.60
89. Canned tomatoes, paste, puree, sauce	10.42
90. Regular coffee	10.40
91. Oranges	10.40
92. Noodles, macaroni, spaghetti	10.19
93. Bath, hand, facial soaps	9.91
94. Nuts	9.91
95. Hotdogs	9.88
96. Baby foods and baby care products	9.83
97. Hot cereal and other breakfast foods	9.55
98. Refrigerated doughs, other dairy products	9.45
99. Entrees and soups	9.40
100. Cakes	9.32

What is Incidence of Purchase?

Incidence of Purchase is the number of purchases of a product made by every 100 shoppers going through a "typical" supermarket.

$$\text{Incidence of Purchase} = \frac{\text{Number of product purchases}}{\text{Number of shoppers}} \times 100$$

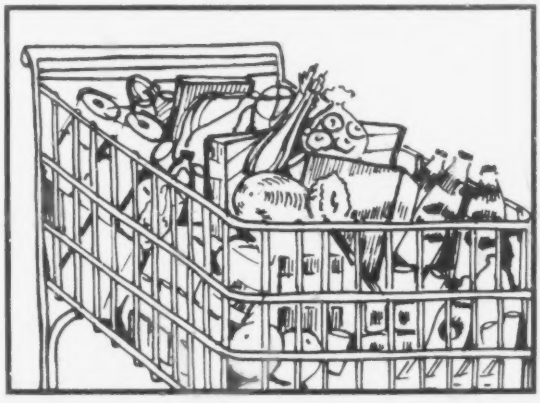
Incidence of Purchase is related to product movement but it is not a direct reflection of product volume since package size, and multiple purchases are not reflected in this formula.

On what is Incidence of Purchase based?

The POPAI/DuPont Consumer Buying Habits Study, a national survey covering 74 product categories sold in supermarkets, provided data for the analysis of Incidence of Purchase. The figures are based on 53,000 purchases made by 4,000 shoppers in 203 representative supermarkets distributed nationally according to a validated pattern based on U. S. Government census figures. It is the only national study of consumers which records their purchases in this detail.

How can you use Incidence of Purchase?

This brochure contains national Incidence of Purchase figures. The information helps the marketing community identify important segments of the consuming public. It provides guidelines for tailoring in-store promotions and advertising to those consumers *who buy the most* (or least) or any specific product.



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Special Report

POPAI/DuPont Consumer Buying Habits Study

SPECIFICALLY PLANNED	GENERALLY PLANNED	+ SUBSTITUTE	+ UNPLANNED	= STORE DECISIONS
35.2	14.8	3.0	47.0	64.8

(Total Study Average)

Store Decisions... 2/3 of Every Dollar Spent In The Marketplace

SPECIAL REPORT

The POPAI/DuPont study found fewer large families, generally smaller households, and higher incomes

☐ In 1965, the E. I. DuPont company released the results of a study designed to monitor and report on the consumer's buying habits at the supermarket. The study was the seventh for DuPont, the first having been conducted in 1935.

Last year, fully 12 years after the 1965 study, the Point-of-Purchase Advertising Institute and DuPont collaborated on yet another consumer buying habits study. It is the results of that study, and the comparisons between the 1977 study and the one that preceded it, that will be reported here.

First, some preliminaries. The study, financed by some 50 national advertisers, was conducted by recording 53,000 purchases made by 4,000 shoppers at 200 supermarkets throughout the country then comparing these purchases with what the consumers who made them said they would buy as they entered the super-

The POPAI/DuPont study: 1965 vs. 1977

	1965	1977
Avg. item price	$ 0.62	$ 1.30
Avg. no. of items purchased	13.30	13.60
Avg. purchase	$ 8.01	$17.68
Use of shopping list	37.40%	40.00%
Use of newspaper ads	32.30%	38.30%
Two or fewer trips a week	49.50%	58.30%
% of purchases specifically planned	31.10	35.20
% of purchases generally planned	17.20	14.80
Substitute purchases	1.80%	3.20%
Unplanned purchases	49.90%	46.80%
Total store decisions (Includes generally planned, substitute and unplanned purchases)	68.90%	64.80%

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Classification of purchases, 1977 POPAI/DuPont consumer buying habits study

Product Purchased	Type of buying decision: % Specifically planned	% Generally planned	+ % Substitute total	+ % Unplanned	= 1977 % Total Store decision	1965 % Total Store decision
Baked foods						
Baking mixes	25.6	9.3	2.9	62.2	74.4	78.3
Baking needs except sugar and mixes	36.9	17.9	2.3	42.9	63.1	70.1
Bread, white	44.0	23.5	5.2	27.3	56.0	57.2
Bread other, croutons	36.9	17.2	6.0	37.9	63.1	75.6
Cakes and pies	15.7	11.9	2.4	70.0	84.3	84.4
Donuts, sweet rolls, other pastry, fresh	18.8	10.0	2.2	69.0	81.2	87.0
Rolls, buns, muffins, not sweet, fresh	22.9	16.3	4.2	56.6	77.1	80.0
Beverages						
Coffee, instant and regular	56.3	7.4	2.9	33.4	43.7	48.5
Tea and chocolate beverages, beverage mixes	33.8	5.5	4.2	56.5	66.2	65.3
Candy, crackers, cookies, snacks						
Candy and gum	15.2	9.6	1.7	73.5	84.8	89.8
Cookies	15.3	17.2	2.4	65.1	84.7	89.8
Crackers	27.5	12.7	2.7	57.1	72.5	74.8
Nuts and dried fruits	17.6	22.9	2.8	56.7	82.4	87.5
Snacks and gourmet foods	20.2	10.0	2.1	67.7	79.8	80.3
Dairy						
Butter, margarine	37.9	15.2	7.0	39.9	62.1	63.4
Buttermilk, cream, ref. substitutes, yogurt, and sour cream	33.4	20.4	4.9	41.3	66.6	69.9
Cheese, cheesespreads, spreads	29.7	18.3	2.6	49.4	70.3	78.5
Milk and eggs	53.2	23.9	2.8	20.1	46.8	45.1
Refrigerated doughs, other dairy products	24.0	12.0	4.0	60.0	76.0	80.3
Deli						
Bacon	28.5	22.6	4.0	44.9	71.5	74.9
Ham and lunch meat	28.4	22.9	2.2	46.5	71.6	69.7
Hotdogs	25.5	16.9	5.2	52.4	74.5	80.1
Sausage and scrapple	25.3	15.9	3.1	55.7	74.7	81.5
Desserts						
Desserts—gelatin and puddings	31.8	11.6	2.0	54.6	68.2	82.9
Frozen foods						
Frozen baked goods, dough	15.8	9.0	3.7	71.5	84.2	86.6
Frozen dinners, entrees, other frozen foods	22.8	11.3	2.8	63.1	77.2	85.6
Frozen fruit juice concentrates	33.2	15.7	4.7	46.4	66.8	75.8
Frozen fruit, vegetables	21.7	17.9	5.3	55.1	78.3	85.4
Ice cream, ice milk	27.9	16.7	2.2	53.2	72.1	79.6

Classification of purchases, 1977 POPAI/DuPont consumer buying habits study

Product Purchased	Type of buying decision: % Specifically planned	% Generally planned +	% Substitute total +	% Unplanned =	1977 % Total store decision	1965 % Total store decision
General Merchandise						
Alcoholic beverages	33.0	13.3	2.2	51.5	67.0	69.3
Housewares, hardware	18.5	13.6	0.3	67.6	81.5	83.8
Oral hygiene, remedies and vitamins	42.7	3.9	2.1	51.3	57.3	64.6
Other health and beauty aids	27.9	8.6	2.3	61.2	72.1	71.3
Tobacco products and accessories	43.3	5.8	0.4	50.5	56.7	61.0
Pet foods and supplies	44.3	13.8	3.9	38.0	55.7	66.0
Other nonfoods	14.9	7.8	0.4	76.9	85.1	85.4
Groceries						
Baby foods and baby care products	39.0	27.2	2.9	30.9	61.0	80.0
Baking mixes	25.6	9.3	2.9	62.2	74.4	78.3
Baking needs except sugar and mixes	36.9	17.9	2.3	42.9	63.1	70.1
Canned and bottled fruits	23.0	17.0	4.6	55.4	77.0	80.9
Canned and bottled fruit juices and drinks	31.3	11.8	4.7	52.2	68.7	77.5
Canned and bottled vegetable juices	35.2	9.0	3.4	52.4	64.8	75.9
Canned beans, tomatoes, paste, puree, sauce	27.0	12.5	4.1	56.4	73.0	74.6
Canned fresh vegetables except tomatoes	27.3	19.7	4.6	48.4	72.7	80.8
Canned entrees, gravy, gravy mixes, bouillon	22.6	10.5	3.9	63.0	77.4	80.8
Canned soups and mixes	31.8	13.3	2.3	52.6	68.2	75.5
Catsup, chili, barbeque, steak, etc., sauces	30.2	8.7	3.4	57.7	69.8	73.3
Cold cereal	32.4	19.8	2.9	44.9	67.6	73.6
Entree mixes, meat extenders	24.4	7.3	2.0	66.3	75.6	85.3
Ethnic, diet foods	16.7	15.1	2.3	65.9	83.3	80.6
Evaporated, condensed, powdered milk, coffee creamers	43.6	12.1	5.5	38.8	56.4	58.1
Herbs and spices	18.5	23.3	4.1	54.1	81.5	82.4
Hot cereal and other breakfast foods	30.2	11.1	1.0	57.7	69.8	66.7
Mayonnaise and salad dressings	36.9	6.8	3.7	52.6	63.1	65.5
Mustard and relishes, olives, pickles, vinegar	18.3	17.4	2.7	60.6	80.7	82.8
Oils and shortenings	43.8	8.1	3.2	44.9	56.2	57.5
Pastas, cereal grains	26.9	17.5	1.6	54.0	73.1	76.7
Soda, bottled or canned	44.1	8.0	3.9	44.0	55.9	61.3
Spreads	33.0	12.1	3.8	51.1	67.0	75.9
Sugar and sugar substitutes	38.6	20.5	2.2	38.7	61.4	69.2

In 1965, 24.2% of the shoppers shopped once a week; today, 28.6% shop once weekly

market. The intent was to determine what percentage of total purchases was planned before the shopper entered the store, and what percentage was influenced by something that happened after entering the store.

More specifically, the purchases were put into four categories as follows:

- Specifically planned—those purchases where the consumer had a brand or item in mind before she entered the store—and proceeded to buy that brand or item. In unbranded merchandise, such as produce or meat, an item mentioned, then purchased, constituted a purchase that was specifically planned.
- Planned in general—a classification where the shopper had a particular product or product category in mind, but no specific brand. In this instance, the shopper appears willing to be influenced by such store variables as price, displays, new products, etc.
- Substitute—where the shopper changed her mind and did not buy the item she had specifically planned to buy. She might have switched brands or products.
- Purchased without any previous plan—items the shopper did not intend to buy upon entering the store. In other words, impulse purchases.

Against that background, here are the findings uncovered in the 1977 POPAI/DuPont study:

- Between 1965 and 1977, the specifically planned category increased substantially—from 31.1% of all purchases in 1965 to 35.2% in 1977. In other words, shoppers are planning on purchasing more of the items they buy before going to the store.
- Still, the overwhelming percentage of purchase decisions—64.8%

ALL PRODUCTS AVERAGE BUYING DECISIONS

	Specifically Planned	Generally Planned	+ Substitute	+ Unplanned	= Store Decisions
1965	31.1	17.2	1.8	49.9	68.9
1977	35.2	14.8	3.0	47.0	64.8

The changing family

If the consumer's purchasing patterns have changed somewhat during the past 12 years, the makeup of her family has changed a great deal. Some examples of those changes:

- In 1965, 50% of the consumers shopped for households of three people or less. Today, 61.7% of the shoppers have families of three members or less. Put another way, there are more small families, more single-member households.
- Over the same period the number of large families has also changed. In 1965, 25% of the shoppers represented households of five people or more. Today, just 18.8% of the shoppers are members of five-person households.
- If families are shrinking, family incomes are growing. In 1965, 25% of the shoppers represented families with incomes of over $7,500. In 1977, 75% of the shoppers represented families with incomes of more than $7,500. Reasons for the higher incomes: inflation, and the increase in working women.

The study, latest in a series, measured consumer shopping habits in supers—and found many changes

—continues to be made at the store.

• There have been, however, significant changes in buying patterns at the store. For one thing, the "generally planned" category dropped from 17.2% in 1965 to 14.8% in 1977. Conclusion: Shoppers are making more hard-and-fast brand and item decisions be-

Classification of purchases, 1977 POPAI/DuPont consumer buying habits study

Product Purchased	Type of buying decision: % Specifically planned	% Generally planned	+ % Substitute total	+ % Unplanned	= 1977 % Total Store decision	1965 % Total Store decision
Household Supplies						
Air fresheners, other cleaning supplies, waxes	30.5	7.3	3.1	59.1	69.5	65.6
Bags and wraps	29.0	10.7	4.0	56.3	71.0	75.1
Bath, hand, facial soaps	34.5	7.5	1.3	56.7	65.5	62.2
Bleaches, fabric softeners, other laundry products	44.7	6.8	4.9	43.6	55.3	60.8
Dishwashing products, cleansers, oven cleaners	38.9	8.6	3.7	48.8	61.1	63.5
Facial tissues	40.7	8.9	4.4	46.0	59.3	68.8
Laundry detergents and soaps	56.2	4.6	3.9	35.3	43.8	51.3
Napkins, tablecloths, plates and cups	24.9	20.2	0.8	54.1	75.1	80.6
Paper towels	26.1	17.8	5.3	50.8	73.9	69.7
Toilet tissue	37.3	14.7	4.7	43.3	62.7	72.6
Meat, Poultry, Seafood						
Canned and bottled meat, poultry and fish products	27.7	11.3	3.6	57.4	72.3	77.3
Meat, fresh or frozen	38.8	27.5	2.8	30.9	61.2	58.3
Poultry, fresh, frozen or processed	46.0	19.6	3.9	30.5	54.0	57.5
Deli and seafood	26.1	12.3	1.9	59.7	73.9	66.6
Produce						
Fresh fruit	50.6	9.4	1.0	39.0	49.4	59.6
Fresh vegetables	52.8	8.1	0.6	38.5	47.2	55.2
ALL PRODUCTS	35.2	14.8	3.0	47.0	64.8	68.9

Changing buying patterns

Consumers' supermarket shopping patterns are changing—not only in the extent and effect of in-store influences on purchases, but in how, why and on what shoppers spend their food money. Some examples:

- In 1965, the average supermarket product cost 62¢. Today, it costs $1.30.
- Interestingly, though the average cost of an item has doubled in 12 years, shoppers are buying the same number of items today as they did in 1965. Specifically, in 1965, shoppers purchased an average of 13.3 items. In 1977, the average purchase was 13.6 items.
- As a result, the average total purchase jumped from $8.01 in 1965 to $17.68 in 1977—a 121% increase.
- During the 12-year period between the two surveys, the consumer price index for food increased 97%, an indication that consumers are buying more expensive items than they were in 1965. Equally significant, POPAI/DuPont estimates that as much as 24% of the grocery bill consists of items that did not exist in 1965—at least not in the supermarket. To a large extent, this refers to the general merchandise assortments that supermarkets have added, expanded, increased and refined in this decade.
- More consumers are using shopping lists than was the case 12 years ago—reversing a trend that had seen their use decline in past POPAI/DuPont surveys. In 1965, 37.4% of the shoppers used a shopping list. Last year, that figure jumped to 40%.
- The utilization of newspaper ads is also increasing. In 1965, the use of newspaper ads had stabilized to some degree—as 32.3% of the surveyed shoppers said they used such ads. In 1977, this percentage had jumped to 38.3%—an indication that more consumers plan their shopping trips in advance than was the case 12 years ago.
- Perhaps most significant of all the findings is the fact that the consumer's shopping frequency appears to be changing. In 1965, 24.2% shopped once a week; 25.3% shopped twice a week; 22.1% shopped three times a week; 9.7% four times weekly, and 5.9% five times weekly. In 1977, 28.6% of the consumers shopped once a week, a significant increase. Similarly, 29.7% of the consumers shopped twice a week, another hefty gain. Conversely, those shoppers shopping three or more times weekly have declined—with 19.7% shopping three times weekly; 7.9% four times a week; 3.4% five times weekly. Thus, in 1965, 49% of the shoppers shopped no more often than twice weekly. In 1977, 58% shopped no more than twice a week.

To summarize, today's shopper is shopping less frequently, but spending more on each visit to the supermarket. She is planning more of the items she buys before entering the store, relying more heavily on both shopping lists and newspaper ads. However, if the consumer is making more of her shopping decisions at home than she did eight years ago, she still makes almost two-thirds of those decisions at the store—and remains largely a product of such in-store influences as price, new products, and point-of-purchase displays. In other words, the customer is still largely influenced by what she sees in the store—and how she views what she sees.

- Substitute purchases, on the other hand, increased—from 1.8% in 1965 to 3.2% in 1977. In other words, shoppers changed their mind at the store more frequently in 1977—and judging from past survey results, more frequently than they have in many years.
- The "unplanned purchase" frequency declined substantially from the 50% level at which it had remained for many years. In 1965, the unplanned figure was 49.9%. In 1977, the figure dropped to 47.0%. The drop is a significant one—and means that shoppers are impulse-buying fewer items these days.
- As a result of these consumer buying pattern shifts, the total percentage of purchases made as a result of store decisions—that is, the total of generally planned, substitute and unplanned purchases—dipped to 64.8% of all purchases. However, though lower than the 68.9% recorded in 1965, store decisions still account for almost two of every three purchases made. ■

SPECIAL REPORT

The 8th DuPont consumer buying habits study

Another of a continuing series (since 1935) of consumer buying habits originated by DuPont, this study continues a tradition of providing significant information to the supermarket industry and those serving it. It is based on sampling and survey techniques which present an accurate picture of the supermarket shopper's purchasing behavior on a typical shopping trip.

HOW THE SURVEY WAS MADE

THE SURVEY—conducted by IDE ASSOCIATES, INC., Philadelphia, Pa., in conjunction with the Point-of-Purchase Advertising Institute and the Marketing Research Dept., Plastic Products and Resins Dept., E. I. DuPont de Nemours & Co.
THE SAMPLE—8,000 shoppers in 200 representative supermarkets distributed nationally according to a validated pattern based on U.S. government census figures. Shopping days checked were Sunday through Saturday, including all shopping hours. Some 53,000 purchases were recorded.
METHOD
1. As shoppers entered the store, they were asked by especially trained interviewers what they intended to buy. All items (written or thought about) were recorded. For each item the shopper planned to buy, she was asked what brand and kind she had in mind. To avoid influencing behavior, shoppers were not told their purchases would be checked when they left the store.
2. After shoppers had completed their buying, interviewers approached them a second time and, on the same check list, entered actual purchases made.

Nearly ⅔ of every dollar spent results from some decision made in the store

ALL PRODUCTS AVERAGE
Per cent of purchases

Specifically planned	Generally planned +	Substitute +	Unplanned =	Store decisions
35.2	14.8	3.0	47.0	64.8

Classification of purchases

- **Specifically planned and purchased**
A specific brand or item purchased as planned, like OK rye bread, ABC caramels, lettuce or steak.
- **Planned in a general way and purchased**
A general classification like a loaf of bread, a vegetable or some meat.
- **Purchased as a substitute**
A change from a specifically or generally planned item.
- **Purchased without any previous plan**
An item bought which the shopper did not have in mind upon entering the store. Unplanned purchases are often referred to as "impulse" purchases.

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. and no display	No adv. and display	Adv. and no display	Adv. and display
Baking mixes	1.77	1.36	2.02	3.02	3.99
Oil and shortenings	0.96	0.78	1.57	1.82	5.13
Sugar and sugar substitutes	2.24	1.85	2.15	5.48	11.07
Bread, other, croutons	3.00	2.51	3.71	4.85	5.77
Bread, white	6.33	4.59	18.61	17.29	21.56
Baking needs	3.37	2.06	3.79	5.61	5.70
Donuts, sweet rolls, other pastry, fresh	2.75	2.37	2.61	3.66	6.80

Bakery foods & ingredients: puffing up sales with in-store aids

☐ With the new wave of in-store bakeries, conventional wisdom would indicate that packaged baked goods on the self-service shelf will be ignored by customers. But conventional wisdom can be tossed out the window, because although in-store bakery units grew by 16.5% last year, shoppers still showed a strong interest in baking at home.

This means that the supermarket shopper is interested in fresh-tasting baked goods, whether she buys them away from home or makes them in her kitchen, and figures from the Consumer Buying Habits Study show that nearly all baked goods and bakery ingredients are highly sensitive to in-store selling influences.

Baking mixes. The study shows that baking mixes—biscuits, muffins, pancakes, cakes, cookies and pie crusts—are generally not included in a shopping plan. Only 25.7% of the baking mix purchases are specifically planned, and 62.1% are unplanned, indicating that some in-store influence persuades the shopper to buy a baking mix. Interestingly, very little substitution takes place inside the store (4.8%) and only 9.3% of purchases are generally planned before the supermarket trip.

The incidence of purchase (IP) for the category is 14.13 per 100 shoppers, but the eye-catching statistic is the 8.80 IP for cake and cookie mixes, an indication that most shoppers bake for their sweet tooth—or somebody else's.

Baking mixes are sensitive to promotional aids, especially pie crust mixes, demonstrating that more merchandising aids should be used. While displays boost the purchase rate of this category some 49%, advertising pushes it up 122%. Advertising and display bolsters IP by 193%. Pie crust mixes

Incidence of purchase: all shoppers

Product	All shoppers
Baking mixes	**14.13**
Biscuit, muffin, pancake mixes	3.19
Cake & cookie mixes	8.80
Private label	0.33
Pie crust mix	0.82
Other mixes	1.31

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Baking mixes	**100.0**	**25.7**	**9.3**	**1.1**	**1.8**	**62.1**	**70.3**
Biscuit, muffin, pancake mixes	100.0	21.8	4.0	2.4	2.4	69.4	78.2
Cake & cookie mixes	100.0	28.7	11.1	0.6	1.8	57.9	71.3
Private label	100.0	23.1	15.4			61.5	76.9
Pie crust mix	100.0	28.1	12.5			59.4	71.9
Other mixes	100.0	13.7	7.8	2.0	2.0	74.5	86.3

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Baking mixes	**1.77**	**1.36**	**2.02**	**3.02**	**3.99**
Biscuit, muffin, pancake mixes	3.19	3.20	4.11	3.02	2.50
Cake & cookie mixes	1.76	1.36	1.72	3.43	4.00
Private label	0.33	0.32		0.71	
Pie crust mix	0.82	0.41	1.45	0.43	6.25
Other mixes	1.31	1.06	1.85	3.07	

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Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Baking needs	**100.0**	**37.0**	**17.9**	**2.1**	**0.2**	**42.8**	**63.0**
Baking chocolate, bits	100.0	37.9	10.0	4.3		47.9	62.1
Baking powder	100.0	28.6	20.4			51.0	71.4
Extracts & flavorings	100.0	24.6	26.3	1.8		47.4	75.4
Flour	100.0	52.1	16.8	2.7		28.4	47.9
Pie fillings other than puddings	100.0	31.7	13.4	1.2		53.7	68.3
Salt & salt substitutes	100.0	34.2	25.4	1.8		38.6	65.8
Baking needs, other	100.0	22.5	19.8	0.5	1.1	56.0	77.5

behave differently from the rest of the mixes: Advertising has little effect, but displays nearly double the purchase rate. Combining the two promotional aids, IP is boosted nearly seven times.

Coupons, store circulars and retail newspaper ads also have significant effects on cake mixes. A store ad used in conjunction with a coupon will push the average IP up sixfold. A store ad by itself will boost the average purchase rate for the category by 87%. In comparison, a manufacturer's mail coupon will double the IP, while manufacturer's newspaper coupons will only jump the purchase rate a comparatively meager 33%.

Other figures show that the purchase rate of baking mixes is strongest in the under-20 age group (17.28 per 100) and in the 30-39-year-old category (17.30), compared to the 14.13 IP for the category. These figures can be attributed to young girls learning their way around the kitchen and homemakers with growing families practicing what they've learned.

The purchase rate by income group shows that the highest IP is in the $4,000-$6,999 group (15.25). The figures for the other income levels are relatively stable, hovering between 13.25 and 14.74.

Analysis of shopping group composition also reveals some telling statistics. The presence of a child tends to shoot the purchase

Incidence of purchase: all shoppers

Product	All shoppers
Baking needs	**23.58**
Baking chocolate, bits	3.60
Baking powder	1.26
Extracts & flavorings	1.47
Flour	7.52
Pie fillings other than puddings	2.11
Salt & salt substitutes	2.93
Baking needs, other	4.68

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Baking needs	**3.37**	**2.06**	**3.79**	**5.61**	**5.70**
Baking chocolate, bits	3.60	2.69	2.89	4.33	3.29
Baking powder	1.26	1.26		1.61	
Extracts & flavorings	1.47	1.35	9.99	1.37	14.58
Flour	7.52	4.50	10.57	8.36	8.70
Pie fillings other than puddings	2.11	1.24	2.46	2.98	5.06
Salt & salt substitutes	2.93	2.74	0.86	5.14	
Baking needs, other	4.68	3.45	5.78	4.85	5.01

rate up significantly. Understandably, women would have a higher IP than men. But the presence of a child with a man drives the purchase rate up almost double (7.20 for a man to 13.33 for a man with a child). The purchase rate for a woman alone is 13.66, less than the 14.13 average, but with a child it jumps to 16.12. With two or more women and a child, it climbs to 28.57.

Baking needs. Although baking needs shoppers fall into roughly the same buying patterns as baking mix buyers, retailers don't seem to get the mileage they should out of baking needs promotions. Manufacturers strongly boost baking needs with newspaper coupons (23.4% of the items were so promoted), while retailers promote only their flour, pie fillings, chocolate bits and extracts with newspaper coupons to the tune of 7.5%. Yet the purchase rate for manufacturer newspaper coupons is 5.43 buys per 100 shoppers, while the IP with retailer newspaper coupons is 10.13—nearly double the figure.

The most heavily used product in this category is flour, coming in at 7.52 purchases per 100 shoppers, a figure that equals several other entire categories, such as desserts and gelatins.

Interestingly, retailers do recognize the drawing power of flour, and promote it to the point where only 29.5% of all flour purchases are not boosted by ads, coupons or circulars.

Nevertheless, flour is not promoted in the most effective way by retailers. IP jumps to 14.81 (from 5.57) with the help of store ads and coupons, but only 13.7% of the purchases are hyped by these two promotional aids. In contrast, 31.2% of flour bought is done so in conjunction with store ads alone. The IP with store ads is 6.64, less than half the purchase rate than with store ads and coupons.

Unlike baking mixes, baking needs are more sensitive to media advertising than to display ads. With displays, IP rises 84%. With advertising, the purchase rate skyrockets 172%. With both advertising and display, however, that figure inches upward to only 177%, suggesting that the additional cost of advertising is not worth the investment.

Baking needs also react strongly to shopping lists, as well as to the presence of newspaper advertising and coupon redemption. Those who consulted ads purchased at a rate 70% greater than those who did not. Those who redeemed coupons bought baking needs at twice the rate of those who did not, and those who prepared shopping lists took home baking ingredients at almost double the rate of those who did not.

Chocolate Flavored Chip
FROSTING MIX
Creamy White
FROSTING MIX
Sunkist Lemon
FROSTING MIX
Sunkist
HOT TIPS
People who buy cake mixes are
• 3.5 times as likely to buy baking ingredients
• 1.9 times as likely to buy canned fruits
• 1.8 times as likely to buy margarine
• 1.4 times as likely to buy fresh fruits
• Equally likely to buy butter
Betty Crocker
Creamy White
FROSTING MIX
FUN FROSTING IDEAS

Incidence of purchase: all shoppers

Product	All shoppers
Bread, white	**37.99**
Private label	4.17

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Bread, white	**100.0**	**44.0**	**23.5**	**4.1**	**1.1**	**27.3**	**66.0**
Private label	100.0	38.3	37.0	3.1	1.9	19.8	61.7

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bread, white	**6.33**	**4.59**	**18.61**	**17.29**	**21.56**
Private label	4.17	2.62	5.08	8.16	3.51

Purchasers of baking ingredients behaved like baking mix buyers in similar age groups. The under-20 class bought at the quickest pace, while the 20-29 category purchased at the slowest. Presumably, this can be explained by employment figures, which show that women 20 to 29 are more likely to be employed—and therefore less likely to devote time to baking.

The employment survey shows that female shoppers who are out of work buy at a higher frequency. Employed women purchase baking ingredients at a rate of 20.48 per 100, while unemployed women buy at 27.24. The IP for all female shoppers is 25.07.

Judging by income, it would seem that those making more money would do less baking and therefore buy fewer baking ingredients. But the data reflects the opposite behavior pattern: Those making more than $25,000 recorded the highest purchase rate, 28.99. The under-$4,000 group have the lowest purchase frequency (20.06).

The shopping composition figures show a steady IP for most buying configurations, except for those including men. While the presence of a woman or child means a purchase rate of 24 or 25 buys per 100, a man who goes shopping alone will buy baking needs at a rate just under 13 purchases per 100 shoppers.

White bread. White bread is

Incidence of purchase: all shoppers

Product	All shoppers
Bread, other, croutons	**14.98**
Diet bread	1.03
Rye bread	2.93
Bread, whole wheat, other dark	6.69
Raisin bread	0.44
Stuffing bread, croutons, crumbs	3.89

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bread, other, croutons	**3.00**	**2.51**	**3.71**	**4.85**	**5.77**
Diet bread	1.03	0.92	5.26	6.90	
Rye bread	2.93	2.75	1.61	4.62	
Bread, whole wheat, other dark	6.69	6.36	5.82	7.81	20.51
Raisin bread	0.44	0.40		2.74	
Stuffing bread, croutons, crumbs	3.89	3.87	3.46	3.39	5.17

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Bread, other, croutons	**100.0**	**36.9**	**19.2**	**4.1**	**1.9**	**37.8**	**73.1**
Diet bread	100.0	30.0	20.0	5.0	7.5	37.5	70.0
Rye bread	100.0	34.2	21.1	5.3	0.9	38.6	63.8
Bread, whole wheat, other dark	100.0	46.9	21.2	5.0	2.3	24.6	53.9
Raisin bread	100.0	5.9	23.5	5.9	5.9	58.8	94.1
Stuffing bread, croutons, crumbs	100.0	27.2	13.9	1.3		57.6	72.8

Incidence of purchase: advertising and displays

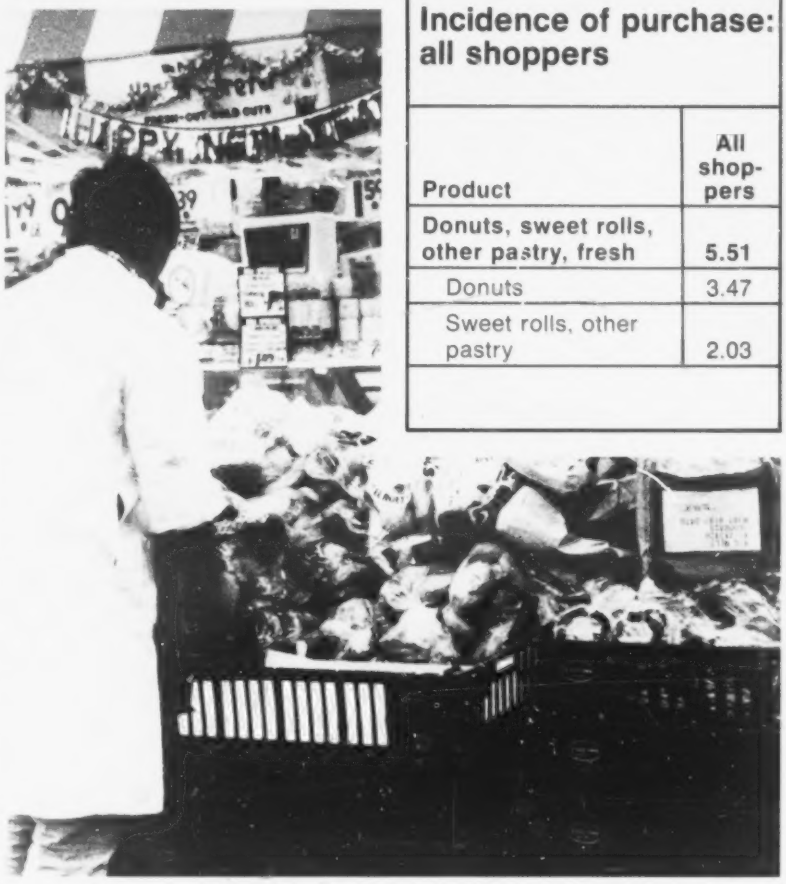
Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Donuts, sweet rolls, other pastry, fresh	**2.75**	**2.37**	**2.61**	**3.66**	**6.80**
Donuts	3.47	2.72	3.24	5.22	11.46
Sweet rolls, other pastry	2.03	2.02	2.11	1.91	2.73

considered to be an American staple, yet the store decision rate is 66%, greater than the 64.8% average for all items in the food store. The unplanned level is a low 27.3%, much lower than the 46.8% level for all supermarket products. All this leads to the conclusion that white bread is subject to a bombardment of in-store influences. The figures show that nearly a quarter of all buyers intend to buy some white bread when they go shopping, but they don't make up their minds until they get into the store. As such, the category is very susceptible to in-store influences.

Incidence of purchase for white bread is 37.99, an indication that it is one of the most widely bought food items. Private label garners 4.17 purchases per hundred, making it the single most popular brand in the category.

Both display and advertising have ballooning effects on white bread purchases, with display boosting IP threefold and advertising 280%. The two merchandising aids, when employed together, do not do much better when used alone; IP rises 370%, suggesting that in-store displays alone may be sufficient.

White bread responds spec-



Incidence of purchase: all shoppers

Product	All shoppers
Donuts, sweet rolls, other pastry, fresh	**5.51**
Donuts	3.47
Sweet rolls, other pastry	2.03

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+	Substitute brand product		+	Unplanned	=	Store decision
Donuts, sweet rolls, other pastry, fresh	100.0	19.2	10.7		0.9	1.9		67.3		80.8
Sugar & sugar substitutes	100.0	38.6	20.4		0.9	0.3		38.8		61.4
Oils & Shortenings	100.0	44.6	7.8		3.0			44.6		65.4

tacularly to promotion by store newspaper coupons and store ads, boosting the purchase rate sevenfold when the two are used together. Yet retailers have failed to jump at the bait, and only 1.1% of all white bread purchases are made in conjunction with store ads and coupons. Nearly a quarter of the purchases are made while store ads are running, however, and while not nearly as effective as ads and coupons, ads alone boost purchases fivefold.

Manufacturer newspaper coupons also have an inflationary effect on the purchase rate, hyping IP nearly fivefold. But manufacturers are in the same know-nothing category as retailers, and only 1.1% of the items purchased were bought with manufacturer newspaper coupons.

Younger shoppers are more inclined to buy white bread, probably because they have more sandwich-eating children and would be more likely to eat bag lunches at work. Purchase rates are roughly the same across all income groups, with a slight dip in the upper brackets, due to the inclination to buy more variety breads as income rises.

The purchase rates for larger households increases dramatically. For a one-person household, the IP is 30.72. This rises to 56.98 for a seven-person household.

The presence of a child in the shopping group also boosts the purchase rate significantly. A woman with a child has an IP of 44.21, 16% over the average purchase rate. A man with a child posts a 50 IP, 32% over average.

Variety breads. The pattern for variety breads is clear: the more popular the bread, the lower the store decision factor. Consequently, whole wheat bread, a common product in the American household with a purchase rate of 6.69 per 100 shoppers, has a com-

Incidence of purchase: all shoppers

Product	All shoppers
Sugar & sugar substitutes	**17.92**
Granulated sugar	11.53
Private label	3.63
Brown sugar	2.96
Confectioners' sugar	2.60
Sugar substitutes	0.82

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Oils & shortenings	**0.96**	**0.78**	**1.57**	**1.82**	**5.13**
Vegetable oils	0.96	0.81	1.17	1.92	4.98
Private label	0.72	0.62		2.26	
Vegetable shortenings	1.04	0.77	2.31	1.81	6.02
Private label	0.62	0.51	0.72		5.26
Pan sprays	0.67	0.65		1.20	

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Sugar & sugar substitutes	**2.24**	**1.85**	**2.15**	**5.48**	**11.07**
Granulated sugar	3.84	3.15	2.83	9.11	17.95
Private label	3.63	2.90	2.53	10.19	33.33
Brown sugar	1.48	1.31	1.03	4.04	2.63
Confectioners' sugar	1.30	1.04	3.14	1.06	
Sugar substitutes	0.82	0.77	0.85		10.53

paratively low store decision rating of 53.9. Simply put, nearly half of all shoppers have a specific brand of whole wheat in mind before they enter the store. Rye bread, the other staple among the many variety breads to hit the market in recent years, has a purchase rate of just under three per 100. One out of three shoppers knows the specific brand of rye he or she will buy before entering the store.

Variety breads also respond well to displays and advertising, although the reaction is not as great as for white bread. Variety bread purchase rates grow 48% through the use of in-store displays, while the purchase rate rises 93% through the use of advertising. With both promotional aids, IP jumps 130%. So if you have to decide whether to promote white bread or variety bread, white bread is the answer.

Like white bread, variety breads are sensitive to news ads, shopping lists and coupon redemption. The purchase rate for variety breads increases 29% when the product is boosted with news ads. Those who use shopping lists buy at a pace 48% greater than those who do not, and those who redeem coupons have a purchase rate 43% greater than those who do not.

Purchase rate for variety breads tends to rise as income grows, perhaps indicating that the well-to-do want more out of life than white bread. In the $7,000-$9,999 category, 12.31 purchases per 100 shoppers are made. In the $25,000 and over group, the figure is 18.18.

Doughnuts and pastries. As expected, doughnuts, pastries and sweet rolls have a very high level of in-store decisions, coming in at 80.8%. The unplanned factor is equally high—67.3%—leading one to believe that in-store displays are crucial here.

However, the purchase rate measurements give rise to an opposite conclusion. Displays boost IP a scant 10%, while advertising jumps the purchase rate 54%. Advertising and display skyrockets the IP 180%, making both promotions a good investment.

Retailers do not promote doughnuts and pastries with newspaper ads together. Nor do manufacturers get involved with coupons often enough to have measurable impact. But store ads alone double the purchase rate, and store coupons bump the IP up 120%. Store circulars perform somewhat effectively, bolstering IP 31%. Supermarket operators have a good feel for promotion here, because 25% of the doughnut and pastry sales are hyped with productive news ads.

Shoppers in their 30's and 40's buy the most pastries, and the study shows that those with larger households buy at a faster pace. Shoppers with seven-person households buy at more than double the rate of those living alone.

Those with higher incomes will also march to a quicker beat, although the pattern here is not so consistent. Poverty-level shoppers will purchase at a rate of 6.47, 17% greater than the category average of 5.51. The IP sinks to 4.36 for the $4,000-$6,999 group and 3.24 for those at the $7,000-$9,999 level. Inexplicably, IP jumps to 6.38 for those families with $10,000-$14,999 incomes, dropping back to 5.90 for those in the $15,000-$24,999 range and up to 7.13 for shoppers above $25,000 annual income.

Sugar and sugar substitutes. Although the store decision level is 61.4%, just under the 64.8% average for all categories, the unplanned purchase percentage stands at 38.8%, substantially below the average of 46.8%. Shoppers have a general idea to buy sugar before entering the store but make up their mind once inside, according to the 20.4% figure for generally planned purchases.

Sugar has a high IP of 17.92, making it one of the most popular items in the store. Nearly two-thirds of the purchases are of granulated sugar. Brown sugar and confectioners' sugar garner 17% and 15% of purchases respectively, while sugar substitutes account for a scant 5% of all purchases in this category.

Advertising dramatically increases the average purchase rate, pushing it up to 5.48 from 1.85 without any promotional aids. Display inches IP upward to 2.15, but the two promotional aids used together increase the purchase rate to 11.07, nearly six times the IP racked up without any promotional help.

Coupon redemption has the greatest booster effect upon purchases. The IP zooms to 31.98 when coupons are redeemed, compared to 14.60 when they are not. In contrast, purchase rate stands at 23.17 when newspaper ads are consulted, and 14.65 when they are not. Shopping lists have an even lesser effect, bringing IP to 21.93 when lists are used and 15.24 when they are not.

Incidence of purchase: all shoppers

Product	All shoppers
Oils & shortenings	**8.60**
Vegetable oils	4.81
Private label	0.72
Vegetable shortenings	3.11
Private label	0.62
Pan sprays	0.67

Oils and shortenings. In terms of buying decision patterns, oils and shortening follow roughly the same course as sugar does. The store decision figure is 65.4%, and the unplanned purchase statistic is 44.6%, slightly below the all-categories average 46.8%. Like sugar purchases, oil is a commodity sensitive to in-store influences.

With displays, the purchase rate nearly doubles. With advertising, it jumps up 133%. Both ads and display bring the IP to 5.13, an almost sixfold increase. According to the figures, ads and coupons seem a bit more worthwhile, since they drive the purchase rate up to 5.21 buys per 100 shoppers. But coupons alone will bring IP to 4.68, only 10% less efficient than ads and coupons or ads and displays in conjunction, making them the best way to go if cash is tight.

Best bets. The best bet is the obvious one: pairing cake mixes with baking ingredients. The match-up is so good that it deserves an exclamation point. People who buy cake mixes are 3.5 times as likely to buy baking ingredients. Also worthy of mention: shoppers who buy cake mixes are 1.4 times as likely to buy margarine, but are only equally likely to buy butter.

Bread buyers are 1.4 times as likely to buy luncheon meats, making the combination this category's best bet. Cold cereal, canned tuna and peanut butter also do fairly well when paired with bread. Malt beverages are an also-ran when paired with bread: Shoppers who buy bread are only 0.96 times as likely to buy with it a malt beverage. ■

Incidence of purchase: advertising and displays					
Product	Brand Average Purchase	No adv. and no display	No adv. and display	Adv. and no display	Adv. and display
Bottled or canned soda	0.93	0.64	2.93	2.74	7.75
Coffee, instant and regular	0.79	0.60	2.52	1.93	8.05
Tea and chocolate beverages, beverage mixes	0.64	0.55	1.27	1.10	1.67
Alcoholic beverages	0.35	0.22	2.51	1.09	2.41

Beverages: adding to a flourishing market

☐ Americans are more weight-conscious than ever before, so much so that two food writers have suggested that we are becoming a nation of "sugophobics." Nevertheless, the nation's sweet tooth is growing in direct proportion to our guilt over nourishing it, and that means that both soft drinks and diet beverages of all sorts are flourishing.

Both dollar sales and tonnage of carbonated beverages advanced steadily last year, and promotional activity by manufacturers and suppliers promise to make the coming year no different.

"Lite" beers, the trade wars between Miller Brewing Co. and Anheuser-Busch, and the skirmishes fostered among lesser companies by the two major brewers have turned the beer market into one of the most changeable food categories in the super.

A chill in Brazil put a crimp in coffee sales last year, but improved crops are expected to effect a comeback. Tea, an old reliable, keeps chugging along and, thanks to a national emphasis on nutrition, promises to remain a shelf staple. As such, beverages remain one of the best products to promote in the store.

Bottled and canned soda. For every 100 shoppers, 33.59 buy soft drinks. More simply, one out of every three shoppers buys soda, making it half as popular as fresh or frozen meat, one-third more popular than poultry, twice as popular as canned fruit juices, four times as popular as all housewares and hardware sold in supers and one-third more popular than frozen dinners.

It is an item that goes with everything, and as such should be promoted often and well. According to the Consumer Buying Habits Study, non-diet soft drinks correlate well with luncheon meats, beer and malt beverages, and ice. Diet soft drinks boost sales of other diet foods spectacularly (diet soda buyers are nearly four times as likely to buy other diet foods) and moderately stimulate purchases of snacks, frozen desserts and cheese.

The store decision factor for canned and bottled soda is understandably low, 55.9%, although store decisions for private label purchases are quite high. The reason: low prices often sway customers from more expensive national labels.

The purchase rate for soft drinks breaks down to 81% for non-diet drinks and 19% for diet drinks. Interestingly, private label accounts for only 10% of the purchases within the non-diet cate-

Incidence of purchase: all shoppers

Product	All shoppers
Bottled or canned soda	**33.59**
Diet soda	6.31
Private label	0.39
Non-diet soda	27.28
Colas	13.26
Private label	0.23
Ginger ale	2.03
Private label	0.36
Lemon/lime	4.89
Private label	0.05
Mixers	0.98
Private label	0.13
Root beer	1.11
Private label	0.13
Miscellaneous brands	3.96
Private label	1.36
Total private label	2.65

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Bottled or canned soda	**100.0**	**44.1**	**8.0**	**3.2**	**0.7**	**44.0**	**55.9**
Diet soda	100.0	46.9	11.4	3.3		38.4	53.1
Private label	100.0	26.7	20.0			53.3	73.3
Non-diet soda	100.0	43.5	7.2	3.2	0.8	45.3	56.5
Colas	100.0	51.8	5.2	2.9	0.6	39.4	48.2
Private label	100.0	22.2		11.1	11.1	55.6	77.8
Ginger ale	100.0	32.9	8.9	5.1		53.2	67.1
Private label	100.0	21.4		7.1		71.4	78.6
Lemon/lime	100.0	42.1	4.7	3.2	2.1	47.9	57.9
Private label	100.0					100.0	100.0
Mixers	100.0	21.1	10.5	5.3		63.2	78.9
Private label	100.0	20.0				80.0	80.0
Root beer	100.0	30.2	2.3	7.0	4.7	55.8	69.8
Private label	100.0	20.0				80.0	80.0
Miscellaneous brands	100.0	33.8	15.6	1.9		48.7	66.2
Private label	100.0	37.7	15.1	1.9		45.3	62.3
Total private label	100.0	30.1	10.7	2.9	1.0	55.3	69.9

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Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bottled or canned soda	**0.93**	**0.64**	**2.93**	**2.74**	**7.75**
Diet soda	0.63	0.55	2.28	1.04	2.42
Private label	0.39	0.40			
Non-diet soda	1.05	0.68	3.03	3.68	8.56
Colas	2.65	1.56	4.52	6.86	11.19
Private label	0.23	0.24			
Ginger ale	0.51	0.46	1.15	1.72	5.26
Private label	0.36	0.36			
Lemon/lime	0.98	0.69	3.73	2.84	11.56
Private label	0.05	0.05			
Mixers	0.24	0.22	1.04	0.25	
Private label	0.13	0.13			
Root beer	0.28	0.21	0.31	2.63	13.79
Private label	0.13	0.13			3.26
Miscellaneous brands	1.32	0.98	2.04	2.49	2.87
Private label	1.36	0.83	3.45	5.56	2.36
Total private label	0.38	0.29	2.73	2.65	

gory and 7% of the buys within the diet group. Cola purchases make up half of the non-diet buys.

Advertising and display both work well in soft drink promotion, with display a bit more effective. The purchase rate increases 350% with displays. With advertising, the jump is 328%. With both promotions, the increase is more than 11 times.

According to the survey, manufacturers rarely promote soft drinks with newspaper or direct mail coupons—1.2% and .5% of the time, respectively—a surprising situation, given the robust purchase rates. With manufacturer newspaper coupons, purchase rate climbs 50%, but with direct mail coupons, the purchase rate skyrockets more than eight times.

Retailers don't have much better judgment. Only .4% of the purchases were bolstered by newspaper ads and coupons, yet the survey shows that incidence of purchase (IP) for soft drinks shoots up some 15 times when boosted with both promotional aids. Newspaper ads seem to be the most used promotional aid—13.7% of the time—and they increase purchase rates by 350%. Coupons are little used—1.7% of the time—increasing IP sixfold. Store circulars are not used often, either—3.3% of the purchases are made in conjunction with them—and purchase rates rise six times. Retailers fail to pro-

HOT TIPS

People who buy non-diet soda are

- **1.6 times as likely to buy ice cream**
- **1.5 times as likely to buy beer**
- **1.4 times as likely to buy luncheon meats**
- **1.3 times as likely to buy a fruit juice concentrate**
- **1.3 times as likely to buy hotdogs**

mote soft drinks 81% of the time.

Purchase rates tend to rise steadily through the income brackets, doubling from poverty level shoppers to those in the $25,000 or more category. Younger buyers tend to bring home more soft drinks, with those in the under 20 (41.98) and 30-39 (46.77) age groups recording the highest purchase rates. Those 60 and older showed the lowest IP, 20.95 purchases per 100 shoppers.

Alcoholic beverages. Like soft drinks, beer is a good sales stimulant, and the item with which it crosses best is tobacco; beer buyers are 3.3 times as likely to buy tobacco. Suds drinkers are also 1.6 times as likely to buy luncheon meats, 1.7 times as likely to pick up a book or magazine and 1.5 times as likely to purchase ice cream.

Buyers make store decisions to buy alcoholic beverages 67% of the time, a bit over the average for all items in the store. However, just over half of the purchases are unplanned. For beer, the store decision level is a low 61%, but for wine and spirits, the store decision statistic is a good deal higher—74.7% and 81.2%, respectively—probably in direct proportion to the advertising support producers give these three product lines. Beer accounts for 59% of the purchases in this category; wine, 35%; and spirits, 6%.

Display is the big booster for the category as a whole, jumping IP 11 times. Advertising bolsters purchase rates fivefold, but advertising and display together stimulate purchases a bit less than displays alone. Displays don't have as marked an effect on beer, boosting the IP sixfold. But, they have a great impact on wine (increasing it 13 times) and an even greater influence on spirits, skyrocketing purchases 39 times.

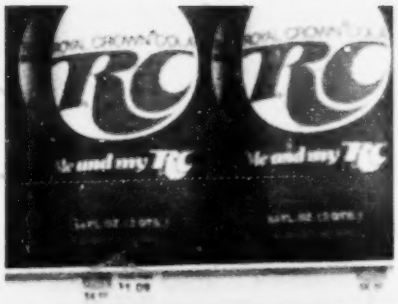
Coupons, either from retailers or manufacturers, store circulars and newspaper ads are not often used, but the study shows that retailers should be paying more attention to circulars. Although only 1.5% of the 270 alcoholic beverage purchases are attributable to circulars, the purchase rate nevertheless rises to 2.63 per 100 shoppers from the .32 buys made per 100 shoppers without any promotional support. Spirits respond better than wine and beer (for which the main support is television and radio), jumping from .25 to 5.26 with the help of store circulars.

Purchase rates noticeably differ when various age and income groups are examined. They rise

HOT TIPS

People who buy diet soda are

- **3.4 times as likely to buy diet foods**
- **1.8 times as likely to buy cheese**
- **1.5 times as likely to buy snacks**
- **1.5 times as likely to buy frozen desserts**
- **1.3 times as likely to buy candy and gum**



Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Alcoholic beverages	**100.0**	**33.0**	**13.3**	**1.5**	**0.7**	**51.5**	**67.0**
Beer, ale & liquors	100.0	39.0	6.9	1.3		52.8	61.0
Wine	100.0	25.3	22.1	1.1	2.1	49.5	74.7
Spirits	100.0	18.8	25.0	6.3		50.0	81.2

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Alcoholic beverages	**0.35**	**0.22**	**2.51**	**1.09**	**2.41**
Beer, ale & malt liquors	0.27	0.22	1.49	1.26	1.77
Wine	0.61	0.24	3.39	0.38	2.67
Spirits	0.41	0.11	4.39	1.96	3.57

steadily as income goes up, with those in the $25,000 and over bracket purchasing at three times the rate of those in the under $4,000 category.

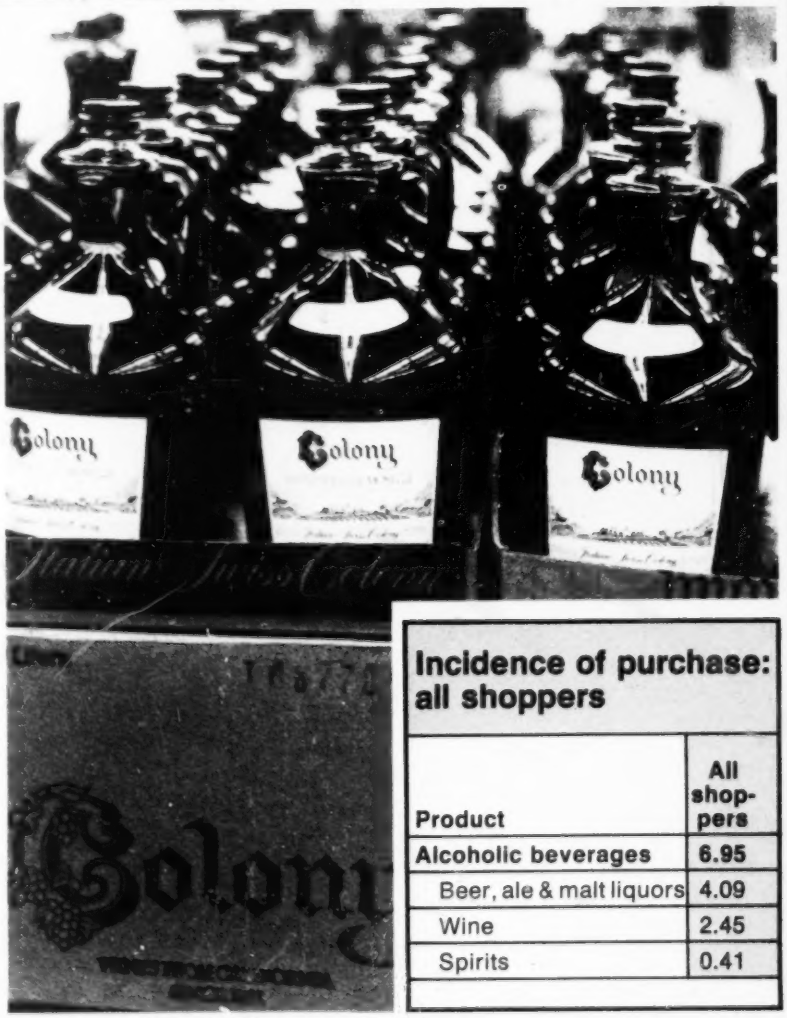
Shoppers in their 30's are the biggest alcoholic beverage buyers, purchasing at a rate of 9.01 per 100 shoppers. Those under 20 and over 60 use alcoholic beverages the least, while those in their 20's and 50's buy at a fairly high rate (5.26 and 4.16 per 100, respectively).

Beer buyers are somewhat younger. Shoppers in their 20's purchase at the highest rate—5.26—while those in their 30's buy slightly less frequently—4.99. The biggest wine buyers are in their 30's (2.75 purchases per 100), and the major spirit drinkers are in their 40's (.72 buys per 100).

Coffee. Coffee buyers are surprisingly big tea drinkers as well—they are 1.9 times as likely to buy tea—and the Consumer Buying Habits Study shows that they are also likely to buy doughnuts, cookies and tobacco.

The coffee buyer generally has a purchase plan mapped out before entering the store. More than half of all coffee buys are specifically planned before the shopper goes shopping, much higher than the 35.2% average rate for all commodity categories.

Shoppers who have general plans to buy coffee also constitute a small percentage, 7.4, compared to the all-categories average of 14.8%. And the substitute figure



Incidence of purchase: all shoppers

Product	All shoppers
Alcoholic beverages	**6.95**
Beer, ale & malt liquors	4.09
Wine	2.45
Spirits	0.41

for coffee is low, 2.9%, compared to the composite of 3.2% for all supermarket products.

Regular coffee still holds sway over this category, accounting for 63% of the purchases. Private label regular coffee is a better performer than private label instant coffee. The house brands of instant coffee make up for only 7% of the private label buys, while private label regular coffee posts a sizable 21%.

Coffee reacts very strongly to advertising and display together and moderately well to display and advertising used separately. IP rises three times when advertising is used and four times when in-store displays are employed. But when both promotions come into play, the purchase rate rises 13 times.

The figures also show that the purchase rate shoots skyward some 19 times when store ads and coupons are used together. Yet the figures indicate that retailers employ these aids only 3.1% of the time.

Purchases react strongly, although not as strongly, to other merchandising aids. Store circulars boost buys some four times; store coupons, eight times; store ads, four times; manufacturer newspaper coupons, two times. Manufacturer direct mail coupons boost purchases 25%, a miniscule figure when compared to the effect of other merchandising tools.

In spite of these promising figures, neither retailers nor manufacturers bolster coffee sales with promotional help very often. The study shows that retailers fail to provide help 77.8% of the time, and their biggest support goes to coupons, a good performer but not nearly as effective alone as when used in conjunction with store ads. Manufacturers fail to provide help 92.9% of the time, although in their case it is more understandable because their coupons are less efficient than the retailers.

Age and income analysis indicate that coffee is still popular among shoppers nearing middle age, and those in the lower and lower-middle income groups (unlike soft drink and alcoholic beverage buyers, who tend to be younger and more well-to-do). A

HOT TIPS

People who buy beer are

- **3.3 times as likely to buy tobacco**
- **1.7 times as likely to buy books and magazines**
- **1.6 times as likely to buy luncheon meats**
- **1.6 times as likely to buy ice cream**
- **0.9 times as likely to buy cheese**

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	product	+ Unplanned	= Store decision
Coffee, instant & regular	**100.0**	**56.3**	**7.4**	**2.6**	**0.3**	**33.3**	**43.6**
Instant coffee	100.0	51.5	8.7	2.9	0.4	36.5	48.5
Private label	100.0	35.3	11.8	5.9		47.1	64.8
Regular coffee	100.0	59.2	6.7	2.5	0.2	31.4	40.8
Private label	100.0	61.9	2.4	2.4		31.0	38.2

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Coffee, instant & regular	**0.79**	**0.60**	**2.52**	**1.93**	**8.05**
Instant coffee	0.62	0.55	0.81	1.15	2.07
Private label	0.44	0.37		1.90	
Regular coffee	0.95	0.64	3.88	2.74	10.51
Private label	2.16	1.32	8.81	5.95	2.63

Incidence of purchase: all shoppers

Product	All shoppers
Coffee, instant & regular	**16.60**
Instant coffee	6.20
Private label	0.44
Regular coffee	10.40
Private label	2.16

coffee drinker in his 40's will buy at a rate of 20.26 purchases per 100, compared to rates of 6.17, 11.71 and 11.69 for people in their teens, 20's and 30's, respectively. And a coffee user who is making $7,000-$9,999 a year will purchase at a rate of 18.57, 10% greater than a shopper making more than $25,000 a year. Instant coffee is more popular with the lower-income buyer, while higher-income shoppers opt more often for regular grind coffee.

A person in a poverty-level bracket, under $4,000 a year, will be more likely than not to buy instant coffee: 8.41 instant coffee buys per 100 compared to 5.65 for those at the $25,000 or more level.

Those in the lower-middle and upper-income brackets drink regular coffee at about the same rate, between 11 and 12 purchases per 100, while those at or near the poverty level buy at a frequency of between 6 and 8.

Tea and chocolate beverages. Unlike coffee purchases, the decision to buy tea conforms to the general trend of other supermarket commodities. The store decision level is 66.1%, a bit over the average, but most of the decisions are unplanned. A whopping 85% of the store decisions are unplanned, while the rest are either generally planned or substitutes.

The purchase rate for tea is 11.15, 49% less than that for coffee. Emphasis on instant tea by manufacturers in the last few years has given this item a big boost, and purchases of instant tea mixes total 42% of the whole tea category.

In spite of the large percentage of in-store decisions posted by tea buyers, tea doesn't respond nearly so well as coffee to in-store promotion. Purchases rise by 131% when

HOT TIPS

People who buy coffee are

- **1.9 times as likely to buy tea**
- **1.5 times as likely to buy cookies**
- **1.4 times as likely to buy tobacco**
- **1.4 times as likely to buy doughnuts and sweet rolls**
- **0.75 times as likely to buy baby food**

Incidence of purchase: all shoppers

Product	All shoppers
Tea & chocolate beverages, beverage mixes	**12.18**
Cocoa & chocolate syrup	1.03
Chocolate or cocoa drink mixes	3.81
Tea, instant tea, mixes	4.66
Private label	0.59
Beverage mixes	2.68
Private label	0.15

displays are used, and they double when advertising comes into play. Advertising and display boost buys by 185%, so if a decision has to be made between coffee and tea promotions, coffee is the choice.

The presence of a woman and, surprisingly, a child in the shopping group boosts purchases significantly. A woman will buy tea and chocolate beverages at a rate of 11.68 purchases per 100 shoppers. For a man, the figure is 7.2. If two women go shopping, the figure jumps to 13.2. Add a child to the group, and the IP rises again to 17.1. A man, woman and child push the figure up to 20.78.

Also in contrast to coffee drinkers, tea drinkers are a bit younger. The highest purchase rates, 16.57 and 15.32, were recorded for those in their 30's and 20's, respectively. The lowest rates, 8.64, 8.32 and 8.66, were tabulated among those in their teens, 50's and 60's. ■

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Tea & chocolate beverages, beverage mixes	**100.0**	**33.8**	**5.5**	**3.4**	**0.8**	**56.4**	**66.1**
Cocoa & chocolate syrup	100.0	47.5	5.0			47.5	52.5
Chocolate or cocoa drink mixes	100.0	31.1	4.1	4.1	1.4	59.5	68.9
Tea, instant tea, mixes	100.0	38.1	8.3	3.3		50.3	61.9
Private label	100.0	43.5	17.4			39.1	56.5
Beverage mixes	100.0	25.0	2.9	3.8	1.9	66.3	74.3
Private label	100.0			33.3	16.7	50.0	100.0

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Tea & chocolate beverages, beverage mixes	**0.64**	**0.55**	**1.27**	**1.10**	**1.67**
Cocoa & chocolate syrup	0.51	0.44		5.07	
Chocolate or cocoa drink mixes	0.63	0.49	1.59	0.99	1.80
Tea, instant tea, mixes	0.78	0.72	0.63	1.38	2.08
Private label	0.59	0.51		1.92	1.01
Beverage mixes	0.54	0.47	1.80	0.41	
Private label	0.15	0.08	15.79		

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Special Report

POPAI/DuPont Consumer Buying Habits Study Household Supplies

Incidence of purchase: advertising and displays					
Product	Brand Average Purchase	No adv. and no display	No adv. and display	Adv. and no display	Adv. and display
Laundry detergents and soaps	0.58	0.44	1.18	2.03	4.62
Bar soap and household cleaning products	0.50	0.47	0.91	0.76	2.27
Bags, wraps, disposable aluminum pans	1.44	1.28	1.37	2.52	2.76
Paper products	1.26	1.00	2.95	3.20	10.19
Napkins, tablecloths, plates and cups	0.42	0.39	0.90	1.60	1.50

Household supplies: private label impact

☐ The $4.3 billion household supplies market has been playing a game on supermarket shelves much like the 1950's fraternity game, "How many people can you fit into a phone booth?" Retailers have been struggling to eke out facings for the many new flavors and sizes of products introduced in the past four years.

What are your customers buying? In volume, mostly household soaps. In units, it's selected paper products. Out of every 100 shoppers in a supermarket, 41.72 are purchasing a paper product. This compares to 20.93 purchases per 100 shoppers of bar soap and household cleaning products, 14.57 purchases for laundry detergents and soaps, 11.53 purchases for bags and wraps and 9.92 purchases for napkins and tablecloths.

One question retailers have been trying to find an answer to in the household supplies category is the impact of private label brands.

Only 0.95 purchases per 100 shoppers in the toilet paper category are of private label brands. But private label in this instance reacts strongly to display. With advertising and no display, it changes to 2.63 purchases, and with advertising and display it goes up to five purchases per 100 shoppers, an increase of more than 500%. Private label paper towels fare even better during promotion. Where the average incidence of purchase (IP) is 1.72, it rises to 6.54 when the product is displayed prominently without advertising; 1.75 with just advertising; and 8.6 with both advertising and display. Clearly, more private label brands can be sold by simply featuring the items in-store. As a matter of fact, the 8.6 incidence of purchase with advertising and display is higher than the 8.1 given the entire paper towel category.

Private label brands in the other household supplies categories do not respond as positively to display. So the super's best course of action creating a private label household supplies program lies in the paper products category.

Buying decisions for household supplies are usually made before the shopper enters the store. Only 43.8% of buying decisions for laundry detergents and soaps are store decisions. This is far below the 64.8% average for all categories, indicating unusually strong brand-consciousness. Of the in-store decisions, only 35.3% are unplanned purchase decisions, again below the study's average of 47.0% for all products.

Incidence of purchase: all shoppers

Product	All shoppers
Bar soap & household cleaning products	**20.93**
Fabric softeners	3.91
Private label	0.51
Other laundry additives	1.70
Washing soda, water softeners	0.41
Stain removers, presoaks	0.57
Starch	0.46
Other laundry products	0.26
Cleansers	3.19
Private label	0.13
All purpose cleaners, liquid, powder, spray	2.21
Private label	0.18
Bath, hand, facial soaps	9.91

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned +	Substitute brand product +	Unplanned =	Store decision
Bar soap & household cleaning products	**100.0**	**38.9**	**6.6**	**2.5**	**52.0**	**61.1**
Fabric softeners	100.0	48.0	6.6	4.6	40.8	52.0
Private label	100.0	20.0	15.0	10.0	55.0	80.0
Other laundry additives	100.0	37.9	12.1	3.0	47.0	62.1
Washing soda & water softeners	100.0	56.3			43.7	43.7
Stain removers, presoaks	100.0	36.4	13.6	9.1	40.9	63.6
Starch	100.0	22.2	22.2		55.6	77.8
Other laundry products	100.0	40.0	10.0		50.0	60.0
Cleansers	100.0	42.7	1.6	4.0	51.6	57.3
Private label	100.0	20.0		20.0		80.0
All purpose cleaners, liquid, powder, spray	100.0	37.2	5.8	1.2	55.8	62.8
Private label	100.0	28.6		14.3	57.1	71.4
Bath, hand, facial soaps	100.0	34.5	7.5	1.3		65.5

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Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bar soap & household cleaning products	**0.50**	**0.47**	**0.91**	**0.76**	**2.27**
Fabric softeners	0.49	0.48	1.06	0.34	2.04
Private label	0.51	0.54			
Other laundry additives	0.34	0.35		0.19	
Washing soda & water softeners	0.41	0.39		1.32	
Stain removers, presoaks	0.28	0.30			
Starch	0.46	0.48			
Other laundry products	0.26	0.26			
Cleansers	0.64	0.62		1.09	4.11
Private label	0.13	0.08		2.63	
All purpose cleaners, liquid, powder, spray	0.37	0.34	0.51	0.89	
Private label	0.18	0.18			
Bath, hand, facial soaps	0.55	0.50	1.39	1.25	2.12

Private label laundry detergents and soaps, however, are bought mainly on impulse. Only 27.8% are specifically planned purchases, with 72.2% of the decisions made in the store. The bulk of store decisions come from those shoppers (55.6%) who buy the product unplanned.

Paper products approach the norm very closely, with 64.1% of the decisions made in the store. However, private label toilet tissue, paper towels and private label paper towels rise above the norm, reflecting the previously mentioned positive reaction from these categories to in-store display. Bar soaps and household cleaning products also reflect the study's average, with only private label brands showing strong impulse sensitivity.

Napkins, tablecloths, bags and wraps, however, prove to be high-impulse items, with store decisions outpacing the industry norm. These materials are bought as disposables, and consumers are reminded that they need them when they walk down a well-merchandised household supplies aisle.

Shoppers in this category are also likely to purchase more than one household supply per shopping trip. In a correlation of products, laundry detergent buyers are 3.37 times more likely to buy bleaches and fabric softeners and 2.87 times

Incidence of purchase: all shoppers

Product	All shoppers
Bags, wraps, disposable aluminum pans	**11.53**
Bags	5.59
Garbage bags	1.03
Leaf & trash bags	1.60
Sandwich bags	2.06
Other bags	0.90
Wraps	5.53
Aluminum foil	3.53
Plastic wrap	1.13
Waxed paper, freezer paper	0.88
Disposable aluminum pans	0.41

Buying decisions

Product	% Total purchase	Specif-ically planned	Gener-ally planned	+ Substitute brand	product	+ Un-planned	= Store decision
Bags, wraps, disposable aluminum pans	**100.0**	**29.0**	**10.7**	**3.8**	**0.2**	**56.3**	**71.0**
Bags	100.0	25.8	12.0	3.7	0.5	58.1	74.3
Garbage bags	100.0	30.0	27.5			42.5	70.0
Leaf & trash bags	100.0	25.8	6.5	3.2	1.6	62.9	74.2
Sandwich bags	100.0	23.8	10.0	6.3		60.0	76.2
Other bags	100.0	25.7	8.6	2.9		62.9	74.4
Wraps	100.0	33.5	10.2	4.2		52.1	66.5
Aluminum foil	100.0	34.3	8.8	3.6		53.3	65.7
Plastic wrap	100.0	36.4	4.5	9.1		50.0	63.6
Waxed paper, freezer paper	100.0	26.5	23.5			50.0	73.5
Disposable aluminum pans	100.0	12.5				87.5	87.5

more likely to buy dishwashing products. They are 2.96 times more apt to buy facial soaps. And interestingly, laundry detergent buyers are 3.3 times as likely to buy wearing apparel.

Who is your household supplies shopper? For paper products, the household size with the highest IP consists of more than two people. The shoppers generally shop once a week or less. The 20-29 year old is more likely to buy paper products than any other age group, and she is usually a buyer from a middle-income family earning $15,000 or more.

The bar soap and household

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bags, wraps, disposable aluminum pans	**1.44**	**1.28**	**1.37**	**2.52**	**2.76**
Bags	1.40	1.32	1.28	1.28	2.11
Garbage bags	1.03	0.96	0.74	0.74	
Leaf & trash bags	1.60	1.54	1.56	1.56	2.35
Sandwich bags	2.06	1.88	2.74	3.60	3.51
Other bags	0.90	0.91	0.82	0.92	1.05
Wraps	1.84	1.45	3.68	3.59	4.69
Aluminum foil	3.53	2.85	6.25	4.52	5.35
Plastic wrap	1.13	0.99	1.48	1.96	2.90
Waxed paper, freezer paper	0.88	0.85	1.67		
Disposable aluminum pans	0.41	0.47	0.34		

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Laundry detergents & soaps	**100.0**	**56.2**	**4.6**	**3.7**	**0.2**	**35.3**	**43.8**
Private label	100.0	27.8	5.6	11.1		55.6	72.2

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Laundry detergents & soaps	**0.58**	**0.44**	**1.18**	**2.03**	**4.62**
Private label	0.77	0.81	2.15	1.74	

Incidence of purchase: all shoppers

Product	All shoppers
Laundry detergents & soaps	**14.57**
Private label	0.93

cleaning products consumer is buying for a family with three to seven members, is making $10,000-$25,000, and ranges in age from 20 to 49.

The laundry detergent buyer also comes from a large family, with the seven-member household having the highest incidence of purchase. As a matter of fact, this one group's IP is double that for all shoppers. She also visits the supermarket one time a week or less. There is little variance for incidence of purchase when age and income of purchaser are analyzed.

The bags, wraps and disposable aluminum pan shopper is also from a middle-income family with three or more members. She is generally 30-39 years old and, reflecting the overall shopping habits trend, is in the grocery store one time a week or less.

The paper napkins, tablecloths, plates and cups buyer with the highest IP is from a family of four, 30-39 years old and making $15,000 a year or more. Again, the purchaser is in the supermarket one

HOT TIPS

People who buy laundry supplies are

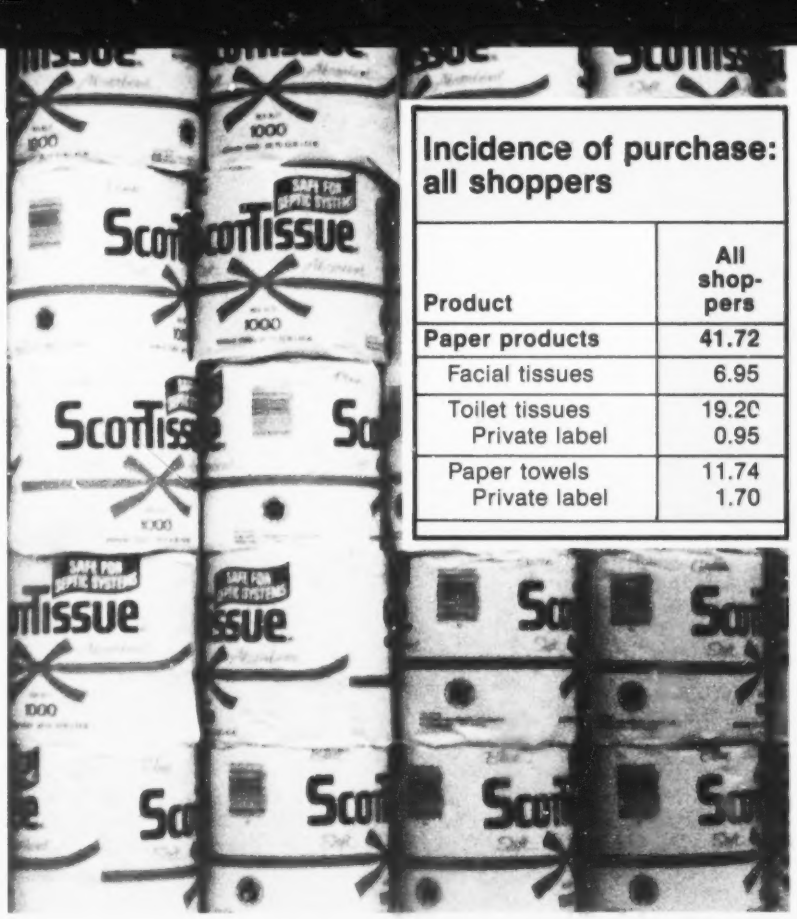
- **3.4 times more likely to buy bleaches and fabric softeners**
- **3.3 times more likely to buy wearing apparel**
- **3 times more likely to buy facial soaps**
- **2.9 times more likely to buy dishwashing products**
- **2.2 times more likely to buy baby foods**

time a week or less.

Perhaps one of the reasons this category reacts so favorably to display is the frequency with which the shopper goes to the supermarket. Paper products such as plates and cups are usually luxury items purchased by the working woman who doesn't want to deal with a sinkful of dishes. She generally doesn't carry a list, but picks up what she feels is necessary as she shops.

Household supplies are historically a promotable category. We've already examined private label brands' response to display, which is indicative of the entire category. But display isn't the only way household supplies are promoted. There is big-time advertising money spent on household supplies by the largest manufacturers in America, including millions of prime-time television dollars. And this category is perhaps the one that most appeals to a shopper on a one-to-one basis—through coupons.

The category's sales jump among those people who use coupons as opposed to those people who do not. The incidence of purchase for redeemers goes up 52%



Incidence of purchase: all shoppers

Product	All shoppers
Paper products	**41.72**
Facial tissues	6.95
Toilet tissues	19.20
Private label	0.95
Paper towels	11.74
Private label	1.70

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Paper products	**1.26**	**1.00**	**2.95**	**3.20**	**10.19**
Facial tissues	6.95	6.36	5.58	7.24	11.80
Toilet tissues	1.20	1.00	2.50	3.97	17.33
Private label	0.95	0.91		2.63	5.00
Paper towels	1.30	1.05	2.83	2.75	8.10
Private label	1.70	1.38	6.54	1.75	8.60

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand product	+ Unplanned	= Store decision
Paper products	**100.0**	**35.9**	**13.6**	**4.5**	**46.0**	**54.1**
Facial tissues	100.0	40.7	8.9	4.4	45.9	59.3
Toilet tissues	100.0	37.3	14.7	4.7	43.3	62.7
Private label	100.0	21.6	21.6	10.8	45.9	78.4
Paper towels	100.0	26.1	17.8	5.3	50.9	73.9
Private label	100.0	21.2	16.7	3.0	59.1	78.8

in laundry supplies alone, showing that purchases in household supplies are made by lots of women snipping cents-off savers.

And when coupons are offered on other household supplies items, the coupon redeemers come on as an equally strong force. The average purchase for laundry detergents and soaps, for example, is 0.58. But couponing boosts that average purchase figure significantly. POPAI/Du Pont found the average purchase jumps to 0.92 with manufacturer newspaper coupons and to 0.97 with manufacturer mail coupons. When a store newspaper ad appears as well as a coupon, this average purchase number leaps to 7.41, the highest for any outside store promotional medium.

Bags and wraps? With a 1.44 average purchase, the figure almost doubles to 2.68 when manufacturers offer newspaper coupons, and 3.48 when store newspaper coupons are available. Napkins, tablecloths and paper plates more than double with manufacturers' newspaper coupons. Selected paper products see IP increase 36.5% with manufacturers' newspaper coupons and 735.7% with store newspaper coupons.

With this dramatic reaction to coupons, manufacturers are indeed making the right move when they concentrate on this area. And armed with these figures, supermarkets can generate even more of that sales action if they include a coupon for any household supplies item in their newspaper ads.

The study found that the incidence of purchase is 14.3% higher among those people who check newspaper ads, and 18.7% higher for people falling into the "had shopping list" category. Bar soaps' purchases are slightly higher for the people who check newspaper ads but increase 24.1% for those people who use shopping lists. Bags and wraps show the same trend. Incidence of purchase is 20.6% higher for people who check newspaper ads and 38.3% higher for those who carry a shopping list.

Let's look at how private label

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Napkins, tablecloths, plates & cups	**0.42**	**0.39**	**0.90**	**1.60**	**1.50**
Napkins & placemats, tablecloths	0.43	0.38	1.28	2.03	1.05
Napkins	0.46	0.40	1.44	2.03	1.05
Private label	0.62	0.58	2.63	4.55	
Tablecloths	0.15	0.16			
Plates, cups, plastic tableware	0.40	0.39	0.55	0.76	2.63
Plates	0.33	0.32	0.72		
Private label					
Cups	0.57	0.56	0.40	0.92	2.63
Plastic tableware	0.18	0.18			

Buying decisions

Product	% Total purchase	Specif-ically planned	Gener-ally planned	+ Substitute brand product	+ Un-planned	= Store decision
Napkins, tablecloths, plates & cups	**100.0**	**24.9**	**20.2**	**0.8**	**54.0**	**75.1**
Napkins & placemats, tablecloths	100.0	24.2	22.5	1.3	52.1	75.8
Napkins	100.0	24.3	22.6	1.3	51.7	75.7
Private label	100.0	33.3	20.8		45.8	66.7
Tablecloths	100.0	16.7	16.7		66.7	83.3
Plates, cups, plastic tableware	100.0	26.4	16.0		57.6	73.6
Plates	100.0	19.6	21.6		58.8	80.4
Private label	100.0	44.4	33.3		22.2	55.6
Cups	100.0	32.8	11.9		55.2	67.2
Plastic tableware	100.0	14.3	14.3		71.4	85.7

brands fare among the bargain-conscious, well-organized shopper.

For private label laundry detergents, purchases among people who check newspaper ads are 22.5% more than the average and 37.6% *lower* for the "had shopping list" group. Private label fabric softeners also lose purchasers, this time in the group checking newspaper ads, but it is slightly higher among people with shopping lists. Private label cleanser purchases drop 46.1% in the "checked newspaper ads" block and are barely affected by shopping list use. Interestingly, private label cleanser sales are highest among the "did not check ads" buyers. But private label all-purpose cleansers fare better—a 1% higher rate of purchase is scored by the people who check ads, and IP is more than double for the group with shopping lists.

Paper products' IP show overall increases. Shoppers who check newspaper ads have an 11.8% higher IP than the average, and those people with shopping lists have a 23% higher purchase rate.

As for private label purchases, paper towels benefit from those groups. IP is 6.5% better than average in the "checked ads" category and 36.5% higher in the shopping list category.

With this data, retailers should:

- Re-evaluate private label lines in the household supplies category.
- Use couponing to boost sales.
- Maximize profit potential by offering products that household supplies buyers are more likely to purchase. ■

Incidence of purchase: all shoppers

Product	All shop-pers
Napkins, tablecloths, plates & cups	**9.29**
Napkins & placemats, tablecloths	6.07
Napkins	5.92
Private label	0.62
Tablecloths	0.15
Plates, cups, plastic tableware	3.22
Plates	1.31
Private label	0.23
Cups	1.72
Plastic tableware	0.18

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Special Report

POPAI/DuPont Consumer Buying Habits Study

CANDY AND GUM

HOW ADS, DISPLAYS AFFECT INCIDENCE OF PURCHASE

PRODUCT	AVERAGE PURCHASE	PURCHASES PER 100 SHOPPERS: NO ADV AND NO DISPLAY	NO ADV AND DISPLAY	ADV AND NO DISPLAY	ADV AND DISPLAY
CANDY & GUM, AVERAGE	0.67	0.56	1.26	0.87	1.56
CANDY, AVERAGE	0.68	0.56	1.38	0.87	1.56
CHOCOLATE CANDY, AVERAGE	0.58	0.55	0.91	0.66	
candy, bagged or boxed	0.61	0.56	0.84	0.72	
candy bars	0.57	0.54	0.99	0.57	1.05
NON-CHOCOLATE CANDY, AVERAGE	0.65	0.50	1.54	1.65	1.51
breathmints	0.28	0.28	0.29		
marshmallows	0.65	0.49	2.61	0.59	1.97
OTHER NON-CHOCOLATE CANDY, AVERAGE	0.73	0.54	1.78	2.16	
GUM, AVERAGE	0.61	0.57	0.89		
bubble gum	0.23	0.24			
regular gum	0.69	0.62	0.95		
sugarless gum	0.77	0.77	0.76		

Reprinted from *Candy & Snack Industry and The Candy Marketer*

More from POPAI/DuPont study

In-store displays/advertising most effective in increasing supermarket candy purchases

The principal candy and gum customer in supermarkets is a woman in her thirties who shops with one or more children and who is employed outside the home and has a yearly family income of between $15,000 and $25,000. She makes the majority of her candy and gum buying decisions while in the supermarket and is influenced by candy and gum advertising as well as in-store displays.

This customer profile emerges from recently released results of a 1977 study of consumer shopping habits in supermarkets conducted by the Point-of-Purchase Advertising Institute and E. I. DuPont de Nemours & Co.

General results of the study, which was based on interviews with 4,000 consumers concerning their purchases of 53,000 items in more than 200 supermarkets nationwide, had been released in mid 1977.

The study not only confirms the long-held view in the candy industry that most candy is bought on impulse, but also provides insight into who buys, what types of candies they buy, and what factors influence their buying decisions.

For instance, the study showed that:

• Fully 84.8 per cent of shoppers in supermarkets who purchased candy and gum made their final decisions in-store, compared with in-store decisions for all product categories made by 64.8 per cent of shoppers. Of those who purchased candy, 84 per cent made their decisions in the store and of those who bought gum, 89 per cent decided to buy while in a supermarket.

• The use of in-store displays dramatically increases the frequency of purchases of candy and gum items. Even more effective, however, is the use of advertising in combination with displays. In-store displays in tandem with advertising can increase the frequency of purchase by as much as three times the average for candy not promoted.

• For nearly all categories of candy promoted — by store newspaper ads, store circulars, and manufacturer newspaper coupons — store newspaper ads showed the most significant results. In fact, store newspaper ads proved to be the single most effective means of increasing candy purchases. In all cases a price incentive is of course involved. Special displays alone do not necessarily mean a promotional price.

• As would be expected, the number of candy and gum purchases per shopper is related to the number of persons in a shopper's household. Generally, the larger the household, the larger the number of purchases per visit to a supermarket.

• Men apparently exert a restraining influence on candy purchases in supermarkets. Men alone make fewer purchases than women alone.

JOB STATUS OF WOMEN SHOPPERS

	PURCHASES PER 100 SHOPPERS		
PRODUCT	ALL FEMALE SHOPPERS	EMPLOYED	NOT EMPLOYED
CANDY & GUM, TOTAL	19 01	19 47	18 79
CANDY, TOTAL	15 70	16 71	15 21
CHOCOLATE CANDY, TOTAL	6 03	6 89	5 62
candy, bagged or boxed	2 54	2 94	2 35
candy bars	3 49	3 95	3 27
NON-CHOCOLATE CANDY, TOTAL	6 18	5 97	6 28
breathmints	0 33	0 64	0 17
marshmallows	2 07	1 47	2 35
OTHER NON-CHOCOLATE CANDY, TOTAL	3 78	3 86	3 75
GUM, TOTAL	3 31	2 75	3 57
bubble gum	0 27		0 39
regular gum	2 19	2 20	2 18
sugarless gum	0 86	0 55	1 00

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When members of both sexes shop together their candy purchasing rate is only slightly higher than the average of all shoppers. A woman's purchase rate increases dramatically when she is accompanied by children only. Men purchase only slightly more candy when accompanied by a child than they do when shopping alone.

• The more frequently a person shops in supermarkets, the fewer candy purchases he or she is likely to make on each trip. The exception here, seems to be the shopper who visits supermarkets six or more times per week. This shopper's rate of purchase is nearly as high as the three times per week shopper.

• Age is a factor in candy purchases. Shoppers between the ages 30 to 39 make more candy and gum purchases than any other age group. These are the "buyers" who are not necessarily the consumers of the products. From this peak, purchases decline progressively on each side of the age spectrum. The under 20 and over 60 age groups make the fewest purchases.

• Although total candy and gum purchases are nearly evenly split between women who are employed outside the home and those who are not employed (including homemakers), buying patterns within candy and gum categories are evident. For instance, working women buy breathmints more often. Women who are not employed outside the home buy marshmallows more often.

The 1977 POPAI/DuPont study is the successor to the DuPont Buying Habits Studies which had been conducted at five year intervals from 1935 to 1965. In the 1977 study, each shopper was interviewed twice — before and after shopping.

Shoppers interviewed were not told a post-shopping interview would be made. This prevented the shopper from being influenced to buy what she/he had said she/he would buy before entering a store.

As shoppers entered a store, they were asked what they intended to

TYPE OF BUYING DECISION

PRODUCT	SPECIFICALLY PLANNED	GENERALLY PLANNED	SUBSTITUTE	UNPLANNED	TOTAL STORE DECISIONS
	%	%	%	%	%
		+	+	=	
CANDY & GUM, TOTAL	15.2	9.6	1.7	73.5	84.8
CANDY, TOTAL	16.0	10.7	1.9	71.4	84.0
CHOCOLATE CANDY, TOTAL	15.9	10.6	2.2	71.4	84.2
candy, bagged or boxed	20.0	5.3	3.2	71.6	80.1
candy bars	12.9	14.4	1.5	71.2	87.1
NON-CHOCOLATE CANDY, TOTAL	18.4	9.6	2.2	69.7	81.5
breathmints	18.2	9.1	—	72.7	81.8
marshmallows	19.7	14.5	1.3	64.5	81.8
OTHER NON-CHOCOLATE CANDY	17.7	7.1	2.8	72.3	82.2
GUM, TOTAL	10.9	4.2	0.8	84.0	89.0
bubble gum	11.1	—	—	88.9	88.9
regular gum	7.5	5.0	1.3	86.3	92.6
sugarless gum	20.0	3.3	—	76.7	80.0

MANUFACTURER NEWSPAPER AND DIRECT MAIL COUPONING/PURCHASES

PRODUCT	MANUFAC NEWSP COUPON	MANUFAC MAIL COUPON	NEITHER
	%	%	%
CANDY & GUM, TOTAL	6 2	—	93 8
CANDY, TOTAL	7 4	—	92 6
CHOCOLATE CANDY, TOTAL	12 3	—	87 7
candy, bagged or boxed	21 1	—	78 9
candy bars	6 1	—	93 9
NON CHOCOLATE CANDY, TOTAL	6 6	—	93 4
breathmints	—	—	100 0
marshmallows	—	—	100 0
OTHER NON-CHOCOLATE CANDY	10 6	—	89 4
GUM, TOTAL	—	—	100 0
bubble gum	—	—	100 0
regular gum	—	—	100 0
sugarless gum	—	—	100 0

HOW MANUFACTURER NEWSPAPER COUPONING AFFECTS PURCHASE RATE

		PURCHASES PER 100 SHOPPERS	
PRODUCT	AVERAGE PURCHASE	MANUFAC NEWSP COUPON	NO MANUFAC COUPON
CANDY & GUM, AVERAGE	0 67	0 82	0 66
CANDY, AVERAGE	0 68	0 82	0 67
CHOCOLATE CANDY, AVERAGE	0 58	0 64	0 58
candy, bagged or boxed	0 61	0 74	0 58
candy bars	0 57	0 47	0 57
NON-CHOCOLATE CANDY, AVERAGE	0 65	1 72	0 62
breathmints	0 28		0 28
marshmallows	0 65		0 66
OTHER NON-CHOCOLATE CANDY, AVERAGE	0 73	1 98	0 67
GUM, AVERAGE	0 61		0 61
bubble gum	0 23		0 23
regular gum	0 69		0 69
sugarless gum	0 77		0 77

STORE NEWSPAPER ADVERTISING CIRCULARS/PURCHASES

PRODUCT	STORE NEWSP AD ONLY	STORE CIRCULAR ONLY	NOT ADV IN NEWSP OR STORE CIRCULAR
	%	%	%
CANDY & GUM, TOTAL	2 7	0 7	96 6
CANDY, TOTAL	3 3	0 9	95 9
CHOCOLATE CANDY, TOTAL	1 3	0 9	97 8
candy, bagged or boxed	1 1		98 9
candy bars	1 5	1 5	97 0
NON-CHOCOLATE CANDY, TOTAL	3 5	0 9	95 6
breathmints			100 0
marshmallows	5 3	1 3	93 4
OTHER NON-CHOCOLATE CANDY	2 8	0 7	96 5
GUM, TOTAL			100 0
bubble gum			100 0
regular gum			100 0
sugarless gum			100 0

buy and, for each item, what brand and product they had in mind. The post-shopping interview was a check on whether the shoppers bought what they had planned or whether they had substituted or added to the list.

The study divided buying decisions into four categories — specifically planned (those items where the consumer intended to buy a brand or item and purchased it as planned); generally planned (when the shopper had in mind a product category or a product without a brand name in mind); substitute purchases (where the shopper changed from a specifically planned item to another item — a switch in brand or product category); unplanned purchases (items the shopper did not have in mind upon entering the store — impulse purchases).

Total store decisions, then, is the combination of all generally planned, substitute and unplanned purchases.

Because the survey was structured to obtain specific information on candy items which were of particular interest to sponsoring manufacturers, candy items were categorized in a somewhat different way than is the norm in the industry. The seven categories surveyed were designated these headings:

- Chocolate Candy
- Candy, bagged or boxed (chocolate)
- Candy bars (chocolate)
- Non-chocolate candy (total of breathmints and marshmallows only)
- Breathmints
- Marshmallows
- Other non-chocolate candy (except breathmints and marshmallows)

Close examination of the study data reveals a plethora of information regarding each candy category. The key to interpreting the results, according to Fred Clarke, manager of marketing research for DuPont's Plastic Products and Resins Department, who engineered the study, is to understand the study's principal guideline — the incidence of purchase concept.

Mr. Clarke, who developed the concept, calls the incidence of purchase a "popularity index." The incidence of purchase is a figure reached by calculating the average number of shoppers who pass through a store before a given item

HOW NUMBER OF PERSONS IN HOUSEHOLD AFFECTS PURCHASES

PURCHASES PER 100 SHOPPERS

PRODUCT	ALL SHOPPERS	ONE	TWO	THREE	FOUR	FIVE	SIX	SEVEN	EIGHT OR MORE
CANDY & GUM, TOTAL	17 99	11 55	15 26	18 01	20 40	25 26	22 91	25 58	16 67
CANDY, TOTAL	14 93	9 47	12 96	14 36	16 93	20 41	21 23	22 09	12 50
CHOCOLATE CANDY, TOTAL	5 84	3 00	4 52	6 55	6 53	8 42	8 94	5 81	8 33
candy, bagged or boxed	2 45	1 62	2 13	2 39	3 33	2 81	2 23	2 33	2 78
candy bars	3 40	1 39	2 39	4 16	3 20	5 61	6 70	3 49	5 56
NON-CHOCOLATE CANDY, TOTAL	5 87	4 62	5 54	5 16	7 07	7 65	6 70	6 98	1 39
breathmints	0 28		0 17	0 25	0 67	0 26	0 56		
marshmallows	1 96	1 39	2 22	1 26	2 27	3 32	1 12	1 16	1 39
OTHER NON-CHOCOLATE CANDY, TOTAL	3 63	3 23	3 15	3 65	4 13	4 08	5 03	5 81	
GUM, TOTAL	3 06	2 08	2 30	3 65	3 47	4 85	1 68	3 49	4 17
bubble gum	0 23		0 09		0 27	1 02		1 16	1 39
regular gum	2 06	1 85	1 62	2 77	1 87	3 06	1 68		2 78
sugarless gum	0 77	0 23	0 60	0 88	1 33	0 77		2 33	

BUYING PREFERENCES BY FAMILY INCOME

PURCHASES PER 100 SHOPPERS

PRODUCT	ALL SHOPPERS	LESS THAN $4000	$4000-6999	$7000-9999	$10,000-14,999	$15,000-24,999	$25,000 AND OVER
CANDY & GUM, TOTAL	17 99	15 86	15 03	16 85	16 17	21 09	18 92
CANDY, TOTAL	14 93	12 62	12 85	13 17	13 21	17 57	16 95
CHOCOLATE CANDY, TOTAL	5 84	2 91	5 88	4 75	6 26	7 03	6 14
candy, bagged or boxed	2 45	1 62	2 83	1 73	2 85	2 27	3 19
candy bars	3 40	1 29	3 05	3 02	3 42	4 76	2 95
NON-CHOCOLATE CANDY, TOTAL	5 87	5 50	4 36	6 05	4 67	6 80	8 11
breathmints	0 28			0 65	0 34	0 11	0 74
marshmallows	1 96	1 94	2 18	1 51	1 71	2 04	2 46
OTHER NON-CHOCOLATE CANDY, TOTAL	3 63	3 56	2 18	3 89	2 62	4 65	4 91
GUM, TOTAL	3 06	3 24	2 18	3 67	2 96	3 51	1 97
bubble gum	0 23	0 32	0 22	0 22	0 34		
regular gum	2 06	2 27	1 31	2 81	1 82	2 27	1 23
sugarless gum	0 77	0 65	0 65	0 65	0 80	1 25	0 74

COMPOSITION OF SHOPPING GROUP

PRODUCT	ALL SHOPPERS	WOMAN ALONE	MAN/EN ONLY	WOMAN/ WOMEN AND MAN/EN	WOMEN, TWO OR MORE	WOMAN/ WOMEN AND 1+ CHILD	WOMAN/ WOMEN MAN/EN AND 1+ CHILD	MAN/EN AND 1+ CHILD
CANDY & GUM, TOTAL	17 99	17 07	11 02	18 09	17 77	26 94	22 08	13 33
CANDY, TOTAL	14 93	14 60	9 75	15 46	15 74	19 69	18 18	10 00
CHOCOLATE CANDY, TOTAL	5 84	5 44	4 24	6 58	6 60	7 43	9 09	10 00
candy, bagged or boxed	2 45	2 65	1 69	1 97	1 52	2 76	2 60	3 33
candy bars	3 40	2 79	2 54	4 61	5 08	4 66	6 49	6 67
NON-CHOCOLATE CANDY, TOTAL	5 87	5 80	4 03	5 59	5 58	8 64	2 60	
breathmints	0 28	0 18				1 21		
marshmallows	1 96	1 80	1 27	2 96	1 52	3 11		
OTHER NON-CHOCOLATE CANDY, TOTAL	3 63	3 82	2 75	2 63	4 06	4 32	2 60	
GUM, TOTAL	3 06	2 47	1 27	2 63	2 03	7 25	3 90	3 33
bubble gum	0 23	0 18				0 86		
regular gum	2 06	1 53	1 06	2 30	2 03	4 84	1 30	3 33
sugarless gum	0 77	0 76	0 21	0 33		1 55	2 60	

FREQUENCY OF SHOPPING IN SUPERMARKET

PURCHASES PER 100 SHOPPERS

TIMES-PER-WEEK

PRODUCT	ALL SHOPPERS	LESS THAN ONE	ONE	TWO	THREE	FOUR	FIVE	SIX OR MORE
CANDY & GUM, TOTAL	17 99	24 12	20 59	17 78	16 15	17 86	6 06	14 01
CANDY, TOTAL	14 93	21 11	16 19	15 26	13 70	13 96	5 30	12 56
CHOCOLATE CANDY, TOTAL	5 84	8 04	7 01	5 38	4 65	6 17	1 52	6 76
candy, bagged or boxed	2 45	3 02	2 70	2 43	1 94	3 57	0 76	1 93
candy bars	3 40	5 03	4 32	2 95	2 71	2 60	0 76	4 83
NON-CHOCOLATE CANDY, TOTAL	5 87	8 04	5 85	6 50	5 81	6 17	0 76	3 38
breathmints	0 28		0 36	0 35	0 26	0 32		
marshmallows	1 96	3 52	2 25	1 91	1 94	1 95		0 48
OTHER NON-CHOCOLATE CANDY, TOTAL	3 63	4 52	3 24	4 25	3 62	3 90	0 76	2 90
GUM, TOTAL	3 06	3 02	4 41	2 52	2 45	3 90	0 76	1 45
bubble gum	0 23		0 36	0 35	0 13			
regular gum	2 06	2 51	2 88	1 56	1 81	2 92	0 76	0 48
sugarless gum	0 77	0 50	1 17	0 61	0 52	0 97		0 97

is bought, which is then figured as Purchases Per Hundred Shoppers.

For example, if six shoppers out of 100 purchase a particular item, that item's incidence of purchase is six. Or, if 200 shoppers pass through a store before one purchase of a particular item is bought, that item's incidence of purchase is .50.

Thus, when the use of advertising, display, etc., effects a rise in the incidence of purchase of an item, it is a direct indication of how sales may increase through promotion.

Beware, though, that "incidence of purchase" does not reflect volume of sales. The figure is merely a record of purchase incident, not of the quantity of items purchased. If a shopper bought three loose candy bars in one shopping trip, it would be recorded as one sale.

The incidence of purchase is particularly useful in tracking the effect of advertising and promotion on items and categories. The POP-AI/DuPont study, for instance, clearly showed that the incidence of purchase rises when candy items are promoted in advertisements and/or in in-store displays.

This is a particularly interesting result which could encourage manufacturers and retailers to feature candy more often in newspaper ads and store circulars.

The study showed that 96.6 per cent of all shoppers who bought candy, bought candy that was not advertised in newspaper ads or store circulars. Yet, one shouldn't conclude from that figure that shoppers pay little attention to candy promotion. On the contrary, according to data in the study the figure is more indicative of the availability of candy advertising in newspapers and store circulars than in shoppers' interest in advertised candy.

Indeed, the data shows that the incidence of purchase of shoppers as a whole is higher for those shoppers who checked newspaper ads before shopping. Also, the incidence of purchase for those shoppers who bought candy was higher on candy items that were advertised than for items that were not. The same holds true for candy that was promoted in-store with identified displays.

The obvious message here is that impulse purchases continue to account for by far the majority of candy and gum sales. In-store displays directly influence (raise) the rate of those purchases. And when in-store displays are supplemented with advertising, purchases increase even more.

The research interviews and data compilations for the study were handled by Ide Associates, Inc., Philadelphia. ■

BUYING PREFERENCES BY AGE

	PURCHASES PER 100 SHOPPERS						
PRODUCT	ALL SHOPPERS	UNDER 20	20-29	30-39	40-49	50-59	60 OR OVER
CANDY AND GUM, TOTAL	17.99	14.81	18.62	23.63	17.95	17.61	13.48
CANDY, TOTAL	14.93	11.11	14.56	19.12	15.20	14.98	11.79
CHOCOLATE CANDY, TOTAL	5.84	4.94	6.91	6.94	6.08	6.66	3.49
candy, bagged or boxed	2.45	2.47	3.15	2.56	2.75	2.50	1.68
candy bars	3.40	2.47	3.75	4.38	3.33	4.16	1.81
NON-CHOCOLATE CANDY, TOTAL	5.87	6.17	4.95	7.80	5.64	5.27	5.54
breathmints	0.28		0.60	0.49	0.14	0.28	
marshmallows	1.96		1.65	2.92	1.45	1.80	2.05
OTHER NON-CHOCOLATE CANDY, TOTAL	3.63	6.17	2.70	4.38	4.05	3.19	3.49
GUM, TOTAL	3.06	3.70	4.05	4.51	2.75	2.64	1.68
bubble gum	0.23		0.15	0.24	—	0.14	0.12
regular gum	2.06	3.70	2.25	3.29	1.45	2.08	1.20
sugarless gum	0.77		1.65	0.97	0.72	0.42	0.36

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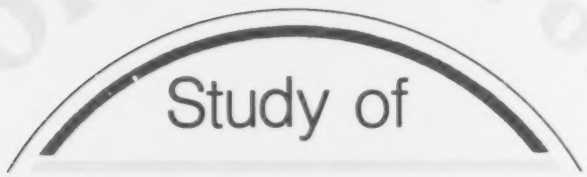

CONSUMER BUYING HABITS

The POPAI/DuPont Consumer Buying Habits Study is the successor to the previously conducted DuPont Studies - which were published in five-year intervals from 1935 to 1965. Although there have been shifts in consumer purchasing patterns since the last study, the bottom line remains virtually unchanged - that is - nearly 2/3's of every dollar spent in the supermarket today results from some decision made in the store. In other words, customers are still largely influenced by what they see in the store - and how they view what they see.

The intent of the Study was to determine what percentage of total purchases was planned before the shopper entered the store, and what percentage was influenced by something that happened after entering the store. 53,000 purchases made by 4,000 shoppers at 200 supermarkets were recorded.

The Study was financed by The Point-of-Purchase Advertising Institute and some 50 companies, leaders in marketing their products through the supermarket. These sponsors are receiving general information (such as found in this report) and special proprietary information about their brands and competing brands - data which will never be published. Additionally, sponsors can order special in-depth reports, such as: correlations of various product groups (eg: snack food vs. beverage purchases); interbrand relationships; total purchases for their customers vs. non-customers; purchases by supermarket size for product lines; and nearly 100 other specially prepared reports.

Sponsors are using these findings in a myriad of ways to improve their position in the marketplace. For example, data can be used for:

- sales presentations
- tracing patterns related to demographics
- market planning/strategies
- generating greater merchandising opportunities
- strengthening retail relationships
- departmentalization
- store layout/design
- sales training programs
- enhancing shelf position
- guidelines for tailoring in-store promotions and advertising

If you are interested in benefiting from this landmark Study, write POPAI 60 East 42nd Street, New York City, New York 10017 for complete details on sponsorship requirements.

A 8700-1.8

Special Report

POPAI/DuPont Consumer Buying Habits Study Canned Entrees and Appetizers

Incidence of purchase: advertising and displays					
Product	Brand Average Purchase	No adv. and no display	No adv. and display	Adv. and no display	Adv. and display
Canned soups and mixes	1.33	1.20	2.00	3.00	3.79
Canned meat, poultry and fish products	0.94	0.73	3.79	2.21	5.56

Canned entrees & appetizers: keeping flux in check

☐ The canned and dry soup category has been in turmoil during recent years, first because of product wars between major dry soup manufacturers, and more recently because of skirmishes among the producers of instant lunches. Although the Consumer Buying Habits Study does not reflect the instant lunch war itself, it does outline the activity of dry soups.

The purchase rate of dry soups is 3.73 purchases per 100 shoppers, or approximately 14% of the purchase rate of the entire department. The most productive canned soup is chicken, with an incidence of purchase (IP) of 6.1. Private label accounts for 12.5% of the purchases in this category.

Canned soup cross-merchandises neatly with canned tuna. The figures show that people who buy canned soup are 2.4 times more likely to buy canned tuna. This is an obvious combination. But people who buy canned soup are 1.4 times more likely to buy stationery and school supplies, a not-so-likely association.

Nearly seven out of 10 canned soup purchases are made on the basis of an in-store decision. The percentage rises with private label brands, probably because of more attractive prices.

Display and advertising are productive store aids, with the combination of ads and displays boosting the IP three times. Display doubles purchases and advertising increases the number of buys 2.75 times. The figures show that mushroom soup is especially sensitive to advertising and display, with purchases zooming nearly 19 times with both merchandising

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Canned soups & mixes	**100.0**	**31.8**	**13.3**	**1.7**	**0.6**	**52.6**	**68.2**
Canned soup	100.0	33.0	13.9	1.5	0.2	51.3	66.9
Canned chicken soup	100.0	30.8	13.9	0.8		54.4	69.0
Private label	100.0	22.2	13.9	2.8		61.1	77.8
Canned muchroom soup	100.0	46.7	13.3	1.9		38.1	53.3
Private label	100.0	35.3	23.5	11.8		29.4	64.7
Canned tomato soup	100.0	38.9	9.7	3.5		47.8	61.0
Private label	100.0	36.8	10.5	15.8		36.8	63.1
Canned vegetable soup	100.0	30.0	13.0	2.0	1.0	54.0	70.0
Private label	100.0	28.6	14.3	7.1		50.0	71.4
Miscellaneous canned soup	100.0	29.1	15.9	0.9	0.3	53.8	70.6
Private label	100.0	34.8	17.4	4.3		43.5	
Total private label	100.0	30.3	15.6	7.3		46.8	69.7
Soup mixes	100.0	27.6	8.3	3.4	2.8	57.9	72.4
Dips	100.0	5.9	23.5			70.6	94.1

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Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Canned soups & mixes	**1.33**	**1.20**	**2.00**	**3.00**	**3.79**
Canned soup	1.41	1.30	2.61	3.68	3.39
Canned chicken soup	2.03	2.11	1.00	0.87	3.88
Private label	0.93	0.83		7.02	2.63
Canned mushroom soup	0.90	0.84		7.25	15.79
Private label	0.44	0.44			
Canned tomato soup	0.97	0.93	0.77	2.26	3.45
Private label	0.49	0.47	0.72		2.56
Canned vegetable soup	0.86	0.85	2.03		
Private label	0.36	0.36			
Miscellaneous canned soup	2.06	1.72	5.88	6.78	1.89
Private label	0.59	0.57	1.33	1.03	
Total private label	0.56	0.53	0.76	2.01	1.49
Soup mixes	1.24	0.80	2.06	2.23	4.26
Dips	0.44	0.47	0.22		

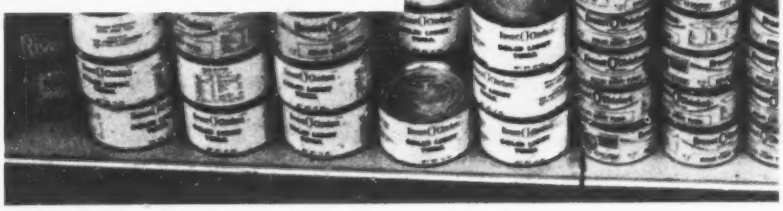
Incidence of purchase: all shoppers

Product	All shoppers
Canned soups & mixes	**26.69**
Canned soup	22.52
Canned chicken soup	6.10
Private label	0.93
Canned mushroom soup	2.70
Private label	0.44
Canned tomato soup	2.91
Private label	0.49
Canned vegetable soup	2.57
Private label	0.36
Miscellaneous canned soup	8.24
Private label	0.59
Total private label	2.81
Soup mixes	3.73
Dips	0.44

modes, and nine times with display alone.

The figures also show that those who redeem coupons will purchase at a rate 75% greater than those who do not. Those using shopping lists will buy a canned soup at a 41% brisker pace than those who do not, and those who check news ads will bring home the soup 31% more frequently than the non-newspaper readers.

Canned meat, fish and poultry. Tuna is the big draw in this category and, indeed, in the entire supermarket. But with the rash of price increases brought about by inconsistent catches, unpredict-



HOT TIPS

People who buy canned tuna are

- 2.8 times more likely to buy canned soup
- 2.1 times more likely to buy mayonnaise
- 1.7 times more likely to buy fresh vegetables
- 1.5 times more likely to buy potato chips
- 1.4 times more likely to buy bread

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Canned meat, poultry & fish products	**100.0**	**27.7**	**11.3**	**2.6**	**1.0**	**57.5**	**72.3**
Canned fish products	100.0	29.0	11.8	2.5	0.7	56.0	71.0
Canned tuna	100.0	36.1	9.5	2.2		52.2	63.9
Private label brands	100.0	28.0	10.0	2.0		60.0	72.0
Other canned fish	100.0	10.2	17.8	3.4	2.5	66.1	89.8
Canned meat products	100.0	24.9	10.5	2.8	1.7	60.2	75.1
Private label brands	100.0	38.5				61.5	61.5
Canned poultry products	100.0	16.7				83.3	83.3

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Canned meat, poultry & fish products	**0.94**	**0.73**	**3.79**	**2.21**	**5.56**
Canned fish products	1.24	0.96	5.20	4.16	7.51
Canned tuna	1.02	0.77	4.69	4.22	7.95
Private label brands	1.29	1.16		2.52	2.63
Other canned fish	3.04	2.66	5.96	3.95	5.95
Canned meat products	0.67	0.51	2.41	1.28	3.16
Private label brands	0.33	0.21		0.88	10.53
Canned poultry products	0.15	0.16			

able weather and environmentalist pressure to restrict porpoise kills, retailers and manufacturers are going to have to get more out of their promotion dollars.

For instance, the Consumer Buying Habits Study shows that canned tuna buyers are good targets for mayonnaise sales (2.1 times more likely) and canned soup sales (2.4 times more likely)—both obvious groupings. But canned tuna buyers are also 1.5 times more likely to buy potato chips and 1.7 times more likely to buy fresh vegetables and bread.

The canned tuna buyer makes a store decision 63.9% of the time, approximately the average for all supermarket items. But the canned meat buyer makes a store decision 75.1% of the time. Three out of five of those purchases are unplanned.

Canned tuna purchases jump 10 times when advertising and display are used together, five times when advertising is used alone and six times when display is employed by itself. Canned meat responds best to display; the IP quadruples when display is used, rises 2½ times when advertising is set up and increases six times when advertising and display are used together. ■

Incidence of purchase: all shoppers

Product	All shoppers
Canned meat, poultry & fish products	**15.98**
Canned fish products	11.17
Canned tuna	8.13
Private label brands	1.19
Other canned fish	3.04
Canned meat products	4.66
Private label brands	0.33
Canned poultry products	0.15

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Special Report

POPAI/DuPont Consumer Buying Habits Study

Pet Foods & Accessories

Reprinted from *Pet•Age Magazine*

STUDY DETAILS SUPERMARKET BUYING HABITS OF PET OWNERS

MORE THAN HALF of supermarket shoppers' purchases of pet foods or supplies are decided upon in the store, according to a study conducted by the Point-of-Purchase Advertising Institute (POPAI) and E. I. DuPont. The purpose of the extensive study was to determine the percentage of purchases planned before entering the supermarket and the percentage of decisions made within the store.

The results indicate that what happens inside the supermarket governs much of the shopper's purchasing patterns. On the average, 55.7% of the pet food/supplies purchases were in-store decisions.

The study analyzed 74 major food and non-food categories, evaluating 53,000 purchases made by 4,000 shoppers at 200 supermarkets across the country. Shoppers were asked about their intended purchases before entering the store, and their predictions were then compared to actual purchases.

The study is based on the landmark DuPont buying habits studies which were begun in 1935 and developed in five-year intervals for the next 30 years.

BUYING DECISIONS

Purchases were divided into four categories to define the type of buying

TYPE OF BUYING DECISIONS

PRODUCT	% Specifically Planned	% Generally Planned	+ % Substitute	+ % Unplanned	= % Total Store Decision
Pet food & supplies	44.3	13.8	3.9	38.0	55.7
Dog food (total)	44.2	14.0	4.5	37.3	55.8
Canned dog food	42.9	14.9	3.1	39.1	57.1
Dry dog food	48.6	13.0	5.9	32.4	51.3
Packet dog food	49.0	12.2	6.1	32.7	51.0
Dog treats	33.8	14.7	4.4	47.1	66.2
Cat food (total)	46.8	11.7	3.9	37.8	53.4
Canned cat food	46.7	13.1	2.3	37.9	53.3
Dry cat food	47.1	9.2	5.8	37.8	52.8
Dog supplies	21.4	14.3	0	64.3	78.6
Cat supplies	34.4	21.9	3.1	40.6	65.6
Other pet food & supplies	37.9	24.1	0	37.9	62.0

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decision made:

Specifically planned refers to purchases for which a shopper had a certain brand or item in mind before entering the store and actually bought the brand or item.

Generally planned includes purchases for which a consumer planned to buy a particular product or category, but not a specific brand.

Substitute denotes that a consumer did not buy an item that she had specifically planned to purchase; the shopper could have changed products or brands.

Unplanned refers to impulse purchases which were not planned before entering the store.

The *store decision* category is determined by adding together generally planned, substitute and unplanned purchases. The store decision category has decreased somewhat since 1965, when 66% of total buying decisions for pet food/supplies were made in the supermarket, compared to the 55.7% figure obtained from the 1977 study. The obvious conclusion is that more consumers are making hard and fast buying decisions before entering the store—and sticking to them.

The study determined that pet food purchasing parallels the situation for staple foods; pets, like people, must eat. In all categories relating specifically to foods (excluding treats), more than half of the buying decisions were generally or specifically planned.

INCIDENCE

One factor that was measured by the study was "incidence of purchase," a term coined by DuPont. This term refers to the number of items purchased per 100 shoppers in the supermarket. The incidence of purchase for pet food and supplies overall was 0.86; that is, there was almost one purchase per 100 shoppers.

Interestingly, the study found that the incidence of purchase varies according to the presence or absence of display and advertising. With no advertising or display, the incidence of purchase for pet food/supplies was 0.79. With display and no advertising, the figure rose to 1.26—better than one purchase per 100 shoppers. With advertising and no display, the incidence of purchase was 1.39. And, with both advertising and display present, the figure rose to 2.12—more than two purchases per 100 shoppers. The message in this case and thorughout the study: *advertising and display working together create the ideal situation, although either is effective when working alone.*

In canned dog food, the study results were somewhat different from the norm, finding that this food reacts better to display than either advertising or a combination of both. The average purchase in this category was 0.75. With no advertising and no display, the incidence of purchase was 0.69; with display only, 1.92; with advertising only, 1.48; with both, 1.61.

For dry dog food, the figures were: average purchase, 0.79; no advertising and no display, 0.69; display only, 1.76; advertising only, 1.53; both advertising and display, 1.89. The combination of merchandising tools proved most successful.

In the cat food segment, the average purchase was 1.22. With no advertising and no display, the incidence of purchase was 1.14; with display only, 2.77; with advertising only, 1.51; with both display and advertising, 5.00. By an impressive margin, advertising and display together were most successful.

The study as a whole showed that consumers do check newspaper ads, and this was true with pet food buyers except for those purchasing cat food. In the latter case, more consumers bought cat food without checking ads, as they did in buying cat and dog supplies. In other pet food and supplies categories, however, buyers did follow the study trend by checking ads.

IDEAL SHOPPERS

Women shopping alone or in a group were found to be the heaviest purchasers of cat and dog foods. Men shopping alone, according to the survey, are less likely to buy these foods by quite a margin. The heaviest purchaser of dog supplies is a man with one or more children.

The pet food buyer characteristically shops twice a week or less and is more likely to shop once a week or less. The average household for the pet food buyer includes three, four or five people. Pet food purchases begin to taper off in households of six or seven, and there is a sharp decline in purchases of about 50% in households with eight or more individuals.

The ideal buying group is between the ages of 20 to 49, with the prime target group between the ages of 20 to 29.

Women employed outside of the home are more likely to buy pet foods or supplies than unemployed women —especially with respect to cat food, where about 40% more employed women buy it than unemployed women. Employed women are also very heavy buyers of cat supplies compared to unemployed women.

As family income increases, so does the incidence of purchase, the study discovered. The prime buying group has an income of $25,000 and higher. In cat supplies it was learned that the heaviest purchasers are those with incomes between $10,000 and $14,999. In the "other pet food and supplies" category, the greatest purchasers are those in the $15,000 to $24,999 income range.

The study determined that buyers generally have an interest in using coupons for pet food and supplies, and a high redemption factor was noted. Coupon redemption for dog food was found to be extremely high, with almost a 50% increase over cat food.

The above information was given to PET AGE exclusively, but POPAI and DuPont have prepared special summary reports on overall supermarket buying habits. The "Master Summary" shows which of the 74 major product categories are most affected by in-store decisions. This eight-page report describes today's consumers and how they shop. The "Non-Foods Summary" describes the effect of in-store display on sales and is also eight pages. The price for each report is $2 per copy, with each additional copy over 25 costing $1.25 each. For further information, contact the Point-of-Purchase Advertising Institute, 60 E., 42nd St., New York, NY 10017. □

Incidence of purchase: advertising and displays

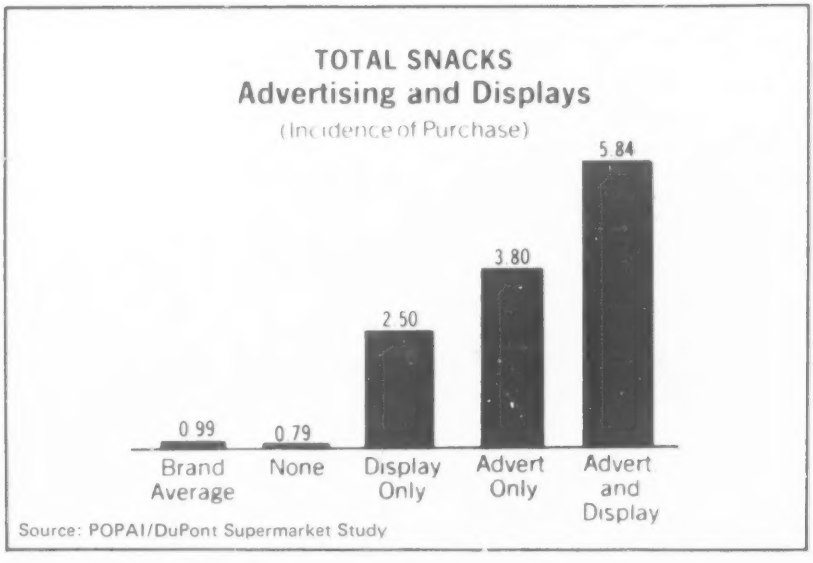
Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Pet foods and supplies	**0.86**	**0.79**	**1.26**	**1.39**	**2.12**
Dog food	0.70	0.70	1.89	1.28	1.27
Canned dog food	0.75	0.69	1.92	1.48	1.61
Private label brands	0.39	0.35	1.80		
Dry dog food	0.79	0.69	1.76	1.53	1.89
Private label brands	0.26	0.26			
Packet dog food	0.42	0.45		0.11	
Dog treats	1.75	1.66	2.61	2.45	
Cat food	1.22	1.14	2.77	1.51	5.00
Canned cat food	1.38	1.25	2.98	1.67	5.00
Dry cat food	1.02	1.00	2.26	1.05	
Dog supplies	0.36	0.31	0.61		
Cat supplies	0.82	0.67	1.22	2.74	2.63
Other pet foods & supplies	0.75	0.86	0.63	1.05	

IT'S NOT TOO LATE TO PUT THE RESULTS OF THE POPAI/DUPONT CONSUMER BUYING HABITS STUDY TO WORK FOR YOU...

If you are interested in benefiting from this landmark Study, write POPAI 60 East 42nd Street, New York City, New York 10017 for complete details on sponsorship requirements.

Special Report

POPAI/DuPont Consumer Buying Habits Study



Marketing snack food

Latest POPAI/DuPont study shows continued high incidence of impulse buying in supermarkets.

What gobbles up 4.5 pounds of potato chips, 3 pounds of corn chips, 1.5 pounds of pretzels and 30 quarts of popcorn per year? The answer—the average American consumer.

Despite our national predilection for between meal snacks, most consumers do very little planning for the purchase of such foods. In fact, eight out of ten shoppers who buy potato chips, pretzels, popcorn, corn chips, and other snacks ranging from Slim Jims to pork rind, make their final purchasing decisions in the store, according to results of the 1977 POPAI/DuPont Consumer Buying Habits Study.

The POPAI/DuPont Study is the successor to the previously-conducted DuPont Buying Habits Studies that were published in five-year intervals from 1935 to 1965. Although there have been shifts in consumer purchasing patterns since the last study, the bottom line has remained virtually unchanged—nearly two-thirds of every dollar spent in the supermarket results from some decision made in the store. In other words, consumers are greatly influenced by what they see in the store.

Methodology

The POPAI/DuPont Study is now being financed by some 50 national advertisers who receive both traditional information and special, "unpublished" proprietary data about their products and those of their competitors.

Sponsorships for the 74 major product categories studied are available through the Point-of-Purchase Advertising Institute in New York. In addition to the general and proprietary information, sponsors are also provided with optional special reports such as: correlations of various products, inter-brand relationships, and total supermarket purchases for their customers versus those of non-customers.

The intent of the study was to determine what percentage of total purchases is planned before the shopper enters the store, and what percentage is prompted by the in-store influences. Some 53,000 purchases made by 4,000 shoppers at 200 supermarkets were recorded.

As shoppers entered each store, trained interviewers questioned them as to what generic items and which brands they intended to buy. To avoid influencing behavior, they were not told that their purchases would be checked when they left the store. Actual purchases made were recorded after the consumers had finished shopping and were leaving the store.

The study divided purchases into four categories:

1. *Specifically Planned:* a specific brand of item purchased as planned, like OK shampoo or XYZ cookies.
2. *Generally Planned:* a general classification like a loaf of bread, a vegetable or snack.
3. *Substitute:* a change from a *Specifically* or *Generally Planned* item.
4. *Unplanned:* an item bought that the shopper did not have in mind upon entering the store.

The In-Store Decision Factor is derived by adding *Generally Planned, Substitute* and *Unplanned* purchases. This statistic has been used to promote products, to improve supermarket layouts, to encourage store departmentalization, and to sell the need for special displays. Knowing how to identify and merchandise "high impulse" items contributes significantly to the profitability of national advertisers and supermarkets.

The snack food consumer

Snack purchases have held their own as high impulse items since 1965, although there has been some shift in the pattern of snack buying decisions. The frequency of snack purchases within the *Specifically Planned* category remains almost the same today as in 1965 when 20% of snack purchases were made with pre-planning. This figure is significantly lower than the 35% estimate for all products. However, the all products figure includes staple items.

In the *Generally Planned* category, snacks follow the trend set by all products, showing an approximate 30% drop since 1965 in the number of these buying decisions. Today, 10% of all snack purchases are generally planned, compared to the 14.8% figure for all products. People are not planning what they are going to buy in terms of snacks to as great a degree as they did in the past.

Under *Substitute*, snacks show less change than do other products. The substitution rate is lower.

However, in the *Unplanned Purchase* category, snack foods start! They've gone up slightly in the category since 1965, and the 67.6% figure compares very favorably, in fact 30% better, with the average of all products.

The 80% In-Store Decision figure for the snack foods indus-

TOTAL SNACKS

	Specifically planned	+ Generally planned	+ Substitute	+ Unplanned	= Total store decisions
1965	19.7	12.6	1.6	66.1	80.3
1977	20.2	10.0	2.1	67.7	79.8
ALL PRODUCTS					
1977	35.2	14.8	3.0	47.0	64.8

1977 BUYING DECISIONS

	Specifically planned	+ Generally planned	+ Substitute	+ Unplanned	= Total store decisions
POPCORN	13.7	8.2	—	78.1	86.3
PRETZELS	16.3	10.6	2.9	70.2	83.7
POTATO CHIPS	25.5	12.8	2.1	59.5	74.4
CORN CHIPS	18.1	2.4	1.6	78.0	82.0

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try, derived by adding the *Generally Planned*, *Substitute*, and *Unplanned Purchase* columns, is among the highest in the POPAI/DuPont Consumer Buying Habits Study. Eight out of ten shoppers who buy a snack product make the purchase decision in the supermarket.

Where stores record case movement, the POPAI/DuPont Study calculated the number of people buying a product, and called this measurement the "Incidence of Purchase." The number of purchases of a product is divided by the number of shoppers. Then, to obtain a manageable figure, it is multiplied by 100. For instance, the IP for snack foods is 22.78. For every 100 shoppers that go through the store, nearly 23 snack food purchases are made.

Who is the biggest buyer of snack foods? When men shop alone, the IP is 14.6; add a woman and it jumps to 20.3; add a child and it leaps to 32.4; take the man away and the mother and child score a 37.13. Therefore, the study indicates that the ideal buying atmosphere for snack foods is one that involves the whole family, or one directed to the mother and child. These figures relate to an IP of 22.78 for all shoppers. As you can see, this is a popular category of products since almost one out of five people (18.4%) passing through the supermarket will buy a snack item.

Employed female shoppers have a higher IP rate than those working inside the home. And, the 12% difference is reflected, not only in snack food purchases, but in almost all convenience products examined.

As income goes up, purchases of snacks also increase, until an annual salary of $25,000 is reached. Then, they begin to taper off. This is probably due to changing tastes and to the fact that once families reach a high income level, the younger members begin leaving home.

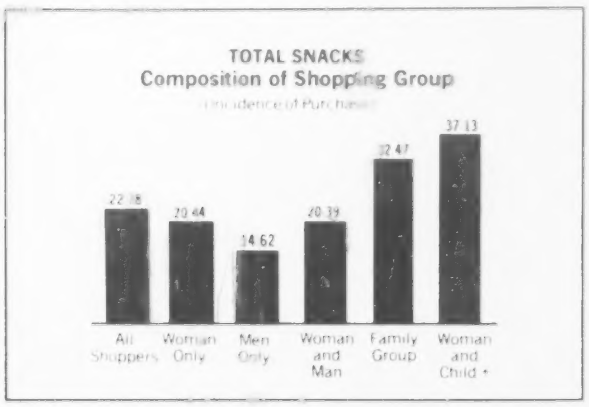
How about age? Under-20-year-olds buy snacks, but the major purchasing group includes the 30 to 39-year-olds. However, this is a reflection of the prevailing buying pattern rather than of consumption. The IP, as well as consumption, begins to taper off in the more elderly categories.

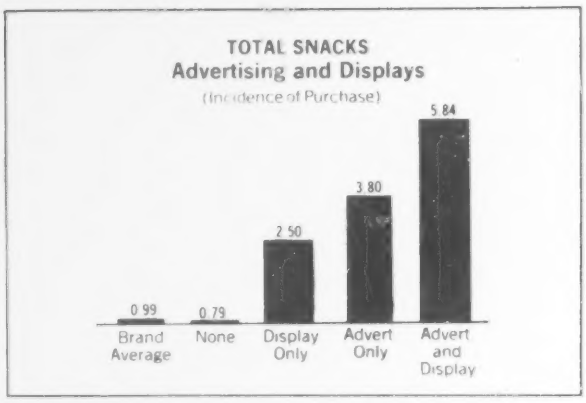
A.C. Nielsen estimates that 35 billion coupons were released by manufacturers last year. The POPAI/DuPont Study found that almost 24% of the shoppers who entered the store had coupons in their possession, and 19.1% used them. Snack shoppers are big users of coupons when they are available. And, when they are, the IP jumps 35%.

Effects of newspaper ads

Examining the total snack category, in-store circulars, which usually indicate a price concession, result in a fivefold increase in the IP. Newspaper ads by themselves do not have the same impact but, when used with coupons, produce 2.5 times more buying decisions than circulars alone.

Limiting this to potato chips, the study reveals that there is a sixfold increase in the IP with circulars. Coupon alone or the combination of newspaper ad and coupon follows the same response for potato chips as the figure for total snacks.





Effects of advertising and display

The impact of advertising in combination with a point-of-purchase display is reflected in a substantial increase in the IP. For example, display alone increases snack food sales 2.5 times, compared to an increase of 3.8 times for advertising alone. When the two are used in tandem, there is almost a sixfold increase.

Sales of potato chips follow essentially the same pattern. In this case, though, the increase is roughly eight times as great as it is without the advertising and display combination.

This is a typical picture of the way in which all snack food purchases are influenced. Similar statistics are reported for nearly all 74 major categories studied. Percentages vary between product categories, products and brands, but the result is a usable curve showing the effects of advertising, display and the two combined.

Deductions and observations

With such information, interactions between related products can be determined by correlations in buying patterns. For example:

Snack buyers are twice as likely to make soft drink purchases as shoppers who do not buy snacks. But the "force" in this case is the drink category because the IP is higher for total soft drinks than it is for snacks.

Snack buyers are even heavier users of cola. In fact, they are 2.3 times as likely to buy a cola product than are non-snack shoppers. Here, snacks are the driving force.

Snack buyers are good customers of malt beverages and buy this drink 1.76 times as often as those who do not buy snacks. Again, snacks are the driving force.

And, snack buyers are 1.5 times as likely to buy cheese foods and spreads as are non-snack buyers. Cheese foods and spreads are the driving force in this case.

Summary

The results of the POPAI/DuPont Study offer critical guidelines for the snack food and supermarket industries:

Snack foods are popular with the supermarket's prime audience—the 30-39 year old group.

Consumers today make fewer shopping trips—they spend an average of 24.9 minutes shopping and seven minutes at the checkout counter—and therefore offer fewer opportunities to be reached by the merchandiser.

Snack purchasers are valuable supermarket customers because they are frequent buyers of other high-cost products.

The interaction of snack foods with other products demands tie-in departmentalization and tie-in display.

These findings are proof positive that, for all its force, preselling has little effect without a connection at the point of purchase. If there is to be growth in the supermarket or within the snack food industry, p-o-p must assume a greater role. It creates a selling environment and extra selling space, generates consumer excitement, provides product data for purchasing decisions, and, most importantly, closes the sale.

THE POPAI • DuPont Study of CONSUMER BUYING HABITS

STORE DECISIONS...2/3 OF EVERY DOLLAR SPENT IN THE MARKETPLACE

The POPAI/DuPont Consumer Buying Habits Study is the successor to the previously conducted DuPont Studies - which were published in five-year intervals from 1935 to 1965. Although there have been shifts in consumer purchasing patterns since the last study, the bottom line remains virtually unchanged - that is - nearly 2/3's of every dollar spent in the supermarket today results from some decision made in the store. In other words, customers are still largely influenced by what they see in the store - and how they view what they see.

The intent of the Study was to determine what percentage of total purchases was planned before the shopper entered the store, and what percentage was influenced by something that happened after entering the store. 53,000 purchases made by 4,000 shoppers at 200 supermarkets were recorded.

The Study was financed by The Point-of-Purchase Advertising Institute and some 50 companies, leaders in marketing their products through the supermarket. These sponsors are receiving general information (such as found in this report) and special proprietary information about their brands and competing brands - data which will never be published. Additionally, sponsors can order special in-depth reports, such as: correlations of various product groups (eg: snack food vs. beverage purchases); interbrand relationships; total purchases for their customers vs. non-customers; purchases by supermarket size for product lines; and nearly 100 other specially prepared reports.

Sponsors are using these findings in a myriad of ways to improve their position in the marketplace. For example, data can be used for:

- sales presentations
- tracing patterns related to demographics
- market planning/strategies
- generating greater merchandising opportunities
- strengthening retail relationships
- departmentalization
- store layout/design
- sales training programs
- enhancing shelf position
- guidelines for tailoring in-store promotions and advertising

IT'S NOT TOO LATE TO PUT THE RESULTS OF THE POPAI/DUPONT CONSUMER BUYING HABITS STUDY TO WORK FOR YOU...

If you are interested in benefiting from this landmark Study, write POPAI 60 East 42nd Street, New York City, New York 10017 for complete details on sponsorship requirements.